DOCUMENT RESUME

ED 478 127 CE 085 037

AUTHOR	Stitt-Gohdes, Wanda L.
TITLE	The Business Education Profession: Principles and Practices.
INSTITUTION	Delta Pi Epsilon Society, Little Rock, AR.
ISBN	ISBN-1-881530-22-1
PUB DATE	2002-00-00
NOTE	125p.
AVAILABLE FROM	Delta Pi Epsilon, P.O. Box 4340, Little Rock, AR 72214 ($20). Web site: http://www.dpe.org/ .
PUB TYPE	Guides - Non-Classroom (055) -- Opinion Papers (120)
EDRS PRICE	EDRS Price MF01/PC06 Plus Postage.
DESCRIPTORS	Accounting; Business Education; *Business Education Teachers; Computer Use; Delivery Systems; Educational Administration; Educational History; Educational Objectives; Educational Practices; Higher Education; Information Technology; *Instructional Development; Keyboarding (Data Entry); *Learning Theories; Marketing Education; Secondary Education; *Student Evaluation; Student Organizations; *Teacher Education; Teaching Methods

ABSTRACT

This monograph provides a framework or foundation for business teacher education. Chapter 1 is an overview and historical perspective of business education that traces the roots of the profession and significant milestones on the path leading to business education today. Chapter 2 discusses administration of business education, including a variety of delivery systems. Other topics are student organizations, related work experience, advisory committees, and program evaluation. Chapter 3 addresses the planning for instruction that is critical for effective instruction, since good learning and student achievement happen when a well-developed plan is implemented. It focuses on these four key aspects in effective planning for instruction: learning theory, factors to consider in planning for instruction, establishing and sequencing objectives, and selecting appropriate assessment strategies. Chapter 4 discusses a variety of instructional strategies. Chapter 5 provides a variety of assessment strategies and examples. Chapter 6 presents specific teaching strategies for these courses commonly included in business education programs in grades 6-12: keyboarding, computer applications software, accounting, basic business, marketing, and information technology. Samples and examples follow some chapters. (YLB)

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THE BUSINESS EDUCATION PROFESSION: PRINCIPLES AND PRACTICES

Wanda L. Stitt-Gohdes

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The Business Education Profession: Principles and Practices

by

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Published by
Delta Pi Epsilon
National Honorary Professional Graduate Society in Business Education

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Introduction

The purpose of this monograph is to lay a framework for business teacher preparation. The beginning, an overview and historical perspective, is important as it traces the roots of our profession and significant milestones on the path leading to business education today. Administration of business education including a variety of delivery systems is discussed next. Planning for instruction is critical for effective instruction; good learning and student achievement happen when a well-developed plan is implemented. Next a variety of instructional strategies are discussed. Your own creativity will shape these to best meet the needs of your learners. Of course, assessment is an important part of the learning process–for both the teacher *and* the student. A variety of assessment strategies and examples are provided. Finally, subject specific basics are addressed in the last chapter.

Please remember this monograph provides a framework or foundation for business teacher education. I encourage you to review other Delta Pi Epsilon publications on specific teaching methods, assessment, and application/technology uses.

I am most grateful to Delta Pi Epsilon for allowing me the opportunity to contribute this work to our profession. Even though it's been nearly 25 years ago, I distinctly remember attending my first DPE National Research Conference in Pittsburgh, PA, and feeling that I was in a very special place. That special place, a community of scholars committed to excellence in leadership, scholarship, and research, exists today; and it's my privilege to be counted among that group.

I thank the Delta Pi Epsilon National Publications Committee for their thorough review, comments, and assistance in devloping this publication. Finally, let me also express my love and gratitude to my husband, Bill, my strongest advocate and my friend. Bill and Clancey and Lady, our wonderful canine companions, keep me ever mindful of the really important things in life.

Chapter One

Overview of Business Education

Every one of us is affected by business, either as consumers or workers. Thus, the study of business enables individuals to participate more fully in society and benefit financially. The history of business education provides the framework for its status today as a field of study. The inclusion of professionalism is a cornerstone to any teacher education area of study.

Historical Development

The development of our nation's economy parallel and the development of business education. Early in our nation's history, colonists bartered with Indians to acquire food and other necessities. This bartering system persisted as our country entered the agrarian era when crop production became a key factor in the lives of our citizens. Not only did family farms provide a food supply for owners, but harvest and food also production became, and continues to be, a key part in the economic growth and development of the United States. The agrarian era continued until the early 1800's and the start of the Industrial Revolution. The Industrial Revolution finally provided the needed manufacturing processes to convert bountiful natural resources into goods to be marketed. The succeeding changes in employment opportunities clearly provided the impetus for a better educated populace regarding commerce as well as the need for developing systems to manage newly emerging business ventures.

Business education as a field of study made an early appearance in the schools in the Plymouth Colony. As early as 1635, the Plymouth Colony hired a school teacher to teach reading, writing, and casting accounts. Casting accounts, the precursor to accounting, was a subject taught in business arithmetic. Signs of early school-to-work initiatives are evidenced as students who wanted a commerceBor businessBcareer left school to work as apprentices. It should not be surprising, then, that bookkeeping was the earliest business course taught in public schools, being offered in Boston in 1709, in New York City in 1731, and in Philadelphia in 1733 (Hosler, 2000).

A significant event happened in 1749 with the founding of Franklin's Academy. The Academy had three departments: the Latin School, the English School, and the Mathematical School. Business subjects offered included "accounts, French, German, and Spanish for merchants; history of commerce; rise of manufacturers; progress and changing seats of trade" (Hosler, 2000, p. 3). In 1827 Massachusetts passed legislation requiring municipalities with 500 or more families to establish a high school. Bookkeeping was one of the specific courses which had to be offered. By this time Boston was a major seaport and, thus, a seat of commerce in New England, making bookkeeping a reasonable requirement.

During this time private business colleges opened to meet the increasing demand for well-educated business workers. Bartlett's Business College opened in Philadelphia in 1834, and Dolber's Commercial College opened in New York City in 1835. The teaching staff for these schools was selected based not on their academic, pedagogical training but rather for their business acumen and experience.

Several occurrences in the 1860's hastened the proliferation of business education as an area of study. In 1862 the Morrill Act, more commonly referred to as the land-grant act, gave every state 30,000 acres of land for every Congressional representative to establish a college for agricultural, mechanical arts, and business instruction. Also in 1862 shorthand was first offered in public high schools, and the first comprehensive high school was established. This comprehensive high school, offering both college preparatory and vocational programs of study, is generally accepted by educators as the most important contribution to education. Finally, in 1868, Christopher Sholes invented the first practical typewriter. Historically, typewriting, and subsequently keyboarding courses, frequently encourage students to enroll in additional business education courses.

The invention of the typewriter, the Civil War, and the subsequent reconstruction period significantly contributed to the growth of business education. These factors were particularly important for women and the workplace. Prior to the Civil War women typically did not work in the business environment. However, with large numbers of men at war, businesses found it necessary to employ women. To some degree, this employment practice continued after the war and into reconstruction. In fact, "To encourage women to enroll in his New York Business School to be prepared as 'type-writers,' Silas S. Packard offered free tuition. His school was the first to teach stenography and typewriting" (Schrag & Poland, 1987, p. 3). In 1878, Frank McGurrin, introduced touch typing; and "By 1900, his method was almost universally accepted" (Hosler, 2000, p. 8).

In the late 1800s John Robert Gregg brought his shorthand system to the United States from Great Britain. Its popularity quickly outpaced the Pitman system, so that " . . . by 1935 it was offered in 96 percent of public high schools teaching shorthand in this country" (Hosler, 2000, p. 10).

While business education continued to grow in the public school environment, it lacked the recognition at the state level important to long-term credibility. I. O. Crissy was appointed New York State "inspector of commercial education" in 1898, the first position of its kind in the country; in 1909 Frederick G. Nichols took over that position (Nanassy, Malsbary, & Tonne, 1977). The appointment of state supervisors of business education was a slow trend which gained significant impetus with the Vocational Education Act of 1963.

Publishing companies have long supported business education as evidenced by the Balance Sheet, first published in 1919 by South-Western Publishing Company for teachers of business subjects. In 1920 Gregg Publishing Company, following the lead of South-Western, published the *American Shorthand Teacher*.

The consumer education aspect of business education was given a boost in 1942 with the Consumer Education Study. The Consumer Education Study was sponsored by the National Association of Secondary School Principals (NASSP) and the Better Business Bureau (BBB). Over a six-year period "12 teaching units on consumer topics were widely distributed in secondary schools" (Hosler, 2000, p. 17). This focus on consumer education was followed by the development of the Council for Consumer Information (CCI) in 1953.

Additional support for business education was garnered in 1944 with the *Education for All American Youth* report co-published by the National Education Association and the American Association of School Administrators. Two of the ten educational needs of youth were directly aimed at business education:

1. All youth need to develop salable skills and those understandings and attitudes that make the worker an intelligent and productive participant in economic life; and

2. All youth need to know how to purchase and use goods and services intelligently, understanding both the values received by the consumer and the economic consequences of their acts (Hosler, 2000, p. 18).

A turning point regarding business education curriculum occurred in 1946 with the invention of the first electronic computer, ENIAC, Electronic Numerical Integrator and Calculator. The subsequent development of the personal computer revolutionized business education.

The year 1953 also brought with it the inauguration of the John Robert Gregg Award, sponsored by the Gregg Division, McGraw-Hill Book Company. The purpose of the award is to honor an individual for his or her lifelong, outstanding contributions to business education.

The Policies Commission for Business and Economic Education (PCBEE) first met in 1959. It was started by the United Business Education Association (UBEA) and Delta Pi Epsilon (DPE), with representatives from each organization comprising the Commission. The Commission's purpose is to better educate people about business and economic education and provide leadership regarding curriculum and instruction in business education. Each year the members of the PCBEE develop one or two statements regarding an important topic, trend, or issue as it relates to the mission of business education. In 1972 the National Business Education Association (NBEA) and DPE invited the Business and Office Education Division of the American Vocational Association (AVA and now ACTE) to become a sponsor and joint partner of PCBEE. The Business Education Division of ACTE also has representation on the Commission.

As might be expected, the 1960s brought significant change to business education. IBM introduced the first Selectric typewriter in 1961 and the magnetic tape Selectric typewriter (MT/ST) in 1964. In 1962 the UBEA changed its name to the National Business Education Association (NBEA). In 1963 the Joint Council on Economic Education brought together "over 60 collegiate and secondary school business educators . . . to discuss how economics could be implemented in business courses" (Hosler, 2000, p. 23). That same year NBEA published the first *NBEA Yearbook*. The year 1965 saw the first minicomputer invented and word processing offered in the business education curriclum. These inventions marked the beginning of dramatic curricular change in business education.

In 1975 the Center for Consumer and Business Education Materials was developed. Originally at Virginia Commonwealth University, the Center is now located at Indiana-Purdue University at Fort Wayne, Indiana. The impact of technology surfaced again in 1978 with the introduction of the electronic typewriter. The electronic typewriter provided the mechanism for storing keyed information on a magnetic card for later retrieval, editing, and/or printing. Documents could be prepared and revised later without having to rekey the entire document.

The 1980s saw an era of standards development and need for increased accountability. In 1983 the Standards for Excellence in Business Education, developed by Calfrey C. Calhoun, were accepted by the U.S. Department of Education. These were followed in 1985 by *The Unfinished Agenda, The Role of Vocational Education in the High School*, published by the National Commission on Secondary Vocational Education. NBEA published the *Database of Competen-*

cies for Business Curriculum Development, K-14 and the *Business Teacher Education Curriculum Guide* in 1987. NABTE published *Standards for Business Teacher Education* in 1988 (Hosler, 2000). All these efforts affected business education curriculum and standards from kindergarten through graduate school.

The Secretary's Commission on Achieving Necessary Skills (SCANS) report, *Learning a Living: A Blueprint for High Performance*, was published in 1992. The SCANS report provided clear guidelines regarding foundational skills needed for workplace success was followed in 1994 by the Goals 2000: Educate America Act. The Goals 2000 Act, as it is often called, "codified into law the six original education goals (school readiness, school completion, student academic achievement, leadership in math and science, adult literacy, and safe and drug-free school) and added two new goals encouraging teacher professional development and parental participation. Goals 2000 also established the National Skills Standards Board to develop voluntary national skill standards" (Hosler, 2000, p. 35). In 1995 NBEA published standards for students in grades K-14, *National Standards for Business Education: What America's Students Should Know and Be Able to Do in Business*.

Federal Legislation

As our nation grew and developed and the economy changed from agrarian to industrial to technological, consistently a number of factors have influenced funding for educational endeavors. A few of these influences include the economy, society, demographics, and technological advances. Beginning in 1862 with the passage of the Morrill Act, the United States government has supported vocational education. The Morrill Act provided land grants to each state to develop educational institutions offering programs in agriculture and the mechanical arts.

However, it took nearly 100 years after federal legislation first supported vocational education for business education to be brought under the vocational education umbrella. And yet today, some are of the opinion that business education is not vocational education. The following definition of vocational education provided by the 1990 Carl D. Perkins Vocational and Applied Technology Education Act, challenges that perspective by stating that vocational education programs are: " . . . organized educational programs offering a sequence of courses which are directly related to the preparation of individuals in paid or unpaid employment in current or emerging occupations requiring other than a baccalaureate or advanced degree" (Scott & Sarkees-Wircenski, 1996, p. 3). Clearly, business education at the middle and high school levels falls under this definition. The value and merit of secondary business education programs is their ability to enable a student to pursue a program of study, graduate, and successfully move into the workforce or postsecondary education.

The Smith-Hughes Act of 1917, also known as the Vocational Act of 1917, promoted the vocational education programs of agriculture, trade and industry, and home economics. Key elements of this legislation defined vocational education as "less than college grade, for persons over 14 years of age who dsire day time training, and for persons over 16 years of age who seek evening class training" (Scott & Sarkees-Wircenski, 1996, p. 122). This legislation also provided funding for teachers' salaries for the three program areas.

With the Vocational Act of 1963, the definition of vocational education was broadened to include "any program designed to fit individuals for gainful employment in business and office occupations" (Scott & Sarkees-Wircenski, 1996, p. 130). This was the first piece of federal legislation to specifically include business education. The Vocational Education Amendments of 1968 were clearly influenced by societal problems and were designed to address rural poverty, high school dropouts, under- and unemployment, and a duplication of legislation. The overriding goal was to provide equal access to appropriate training and retraining for all. Vocational education funding was amended several times in the 1970s; however, the passage of the Carl D. Perkins Vocational Education Act of 1984 brought with it a stronger emphasis on local control. "The act had two interrelated goals, one economic and one social. The economic goal was to improve the skills of the labor force and prepare adults for job opportunitiesBa long standing goal traceable to the Smith-Hughes Act. The social goal was to provide equal opportunities for adults in vocational education" (Scott & Sarkees-Wircenski, 1996, p. 145). The 1984 Perkins Act was amended in 1990 and renamed the Carl D. Perkins Vocational and Applied Technology Education Act. This act was significant for two reasons: first, a major goal was increased vocational opportunities for disadvantaged people; and second, funds were authorized for tech prep programs. Tech prep programs are often referred to as 2+2+2 which refers to the articulated agreements between two years of concentrated vocational coursework at the high school level plus two years of advanced technical education at the postsecondary level and the potential for an additional two years of education leading to the baccalaureate degree. The Perkins legislation required the appointment of state councils on vocational education and the development of long-term state plans for vocational education.

The Goals 2000: Educate America Act of 1994 had as its goal the development of national goals and standards and assistance to states in helping students reach these goals, helping them to succeed in a technology-based economy and society. A key part of this legislation was the creation of a National Skills Standards Board " . . . to stimulate the development of a voluntary national system of occupation standards and certification" (Scott & Sarkees-Wircenski, 1996, p. 156).

"The School-to-Work Opportunities Act (STWOA) [1994] was passed to address the national skills shortage by providing a framework to build a high skilled workforce for our nation's economy through partnerships between educators and employers" (Scott & Sarkees-Wircenski, 1996, p. 157). The authors of the legislation hoped the STWOA would encourage integration of academic and vocational courses, improve career guidance, and include work-based learning, often in the form of apprenticeships.

In 1998 the Carl D. Perkins Vocational-Technical Education Act was amended. The amendments included more funding at the local level and required an equity coordinator in every state.

While business education is not specifically included in most Federal legislation, the impact of Federal legislation is felt in every business education program today. Not only does the funding provide computers for our classrooms, more importantly it also provides for exploratory courses at the middle school level and career guidance, which help students imagine opportunities available to them in the world of work and for which business education is a key conduit.

This section has provided an understanding of the historical underpinnings of business education. The next section defines professionalism and traces the development of professional associations in business education.

Professionalism

When we hear one say, "Mr. Morales is really a professional," each listener may have a different vision of what that means. Typically, the term "professional" is associated with vocations requiring extensive academic preparation. However, one would doubt that a skilled craftsperson is a professional! We can agree that those identified as professionals are extremely competent and dedicated to their chosen careers. They are respected by colleagues, friends, and students and clearly serve as role models to the profession.

Schrag and Poland (1987) identified four standards which typically define a profession:

1. A *common body of knowledge* encompassing a distinct area or discipline, developed over a period of time, and constituting accepted facts, principles, or concepts validated through research and study.

2. A method of *controlling admittance*, such as certification, examination, formal education, license, or other means of evaluating the competence of individuals.

3. A *degree of autonomy* and group control over the members of the profession, the activities in which they engage, and the services they render to the profession and society.

4. The presence of *professional associations* and interest groups which seek to further the profession by improving the competence of members, expanding the knowledge of the discipline, and providing better service in fulfilling its goals (p. 10).

Defining professionalism consistently has been a key part of continuing development of business educators as evidenced by the 1979 Policies Commission for Business and Economic Education's statement that a profession:

1. Requires that its content be based on a theoretical structure and defensible principles, with a continuous effort to extend and validate content and methodology in the field;

2. Exists for the common good of its members and those it serves;

3. Is organized to disseminate a unique body of knowledge for its members and to act as an agent of change in the field (Schrag & Poland, 1987, p. 10).

The University Council for Workforce and Human Resource Education, comprised of 19 of the nation's leading universities, provides leadership for teaching, research, and service initiatives in vocational and technical education. In 1996, the University Council published *Beyond Tradition: Preparing the Teachers of Tomorrow's Workforce*. One purpose of the monograph was to describe state-of-the-art policy and practice for vocational teacher education. Lynch (1996) noted the increase in the professional education knowledge base and teachers' concomitant abilities to better serve the needs of their students. Many teacher preparation programs have adopted more stringent standards recommended by accreditation agencies such as the National Council for Accreditation of Teacher Education (NCATE), certification guidelines developed by the National Board for Professional Teaching Standards (NBPTS), and beginning teacher standards developed by the Interstate New Teacher Assessment and Support Consortium (INTASC). Based on these agencies' principles, an extensive literature review, conversations with vocational and technical teacher educators, and noted reform efforts, Lynch developed these ten principles of vocational and technical teacher education for college/university faculty. They are equally appropriate for business teacher education faculty.

1. Faculty are committed to their students and to students' professional development as lifelong learners.

2. Faculty use curriculum and instructional techniques to integrate theory with practice, academic and workforce education, professional education and subject matter, and learning theory and workforce preparation.

3. Faculty understand the philosophy, contemporary concepts, research, effective practice, and methods of inquiry related to workforce preparation and development.

4. Faculty use dynamic pedagogy, based on learning theory and practices appropriate for youth and adults.

5. Faculty are partners in learning communities through which they model collaboration and democratic processes for their students.

6. Programs are dynamic and change oriented.

7. Programs are grounded in academic education, workplace subject matter, workplace processes, technology, professional education and pedagogy, and clinical practices.

8. Programs reflect cultural diversity.

9. Colleges and universities (and their inherent administrative structures) that offer programs to prepare vocational and technical teachers are committed to such preparation and provide adequate resources to sustain them at high quality levels.

10. Colleges and universities provide a clearly identified group of academic and clinical faculty for whom vocational and technical educator preparation is a top priority (pp. 77-87).

While all these recommendations for professional growth and development emerged over time, they have much in common. They are committed to high admission and program standards, they place students' needs and interests at the center of education, and they encourage programs of study grounded in appropriate subject matter and pedagogy. And while Lynch' comments are directed to vocational and technical teacher education in general, these principles also are appropriate for developing excellent business teacher education programs.

Professions are supported by associations which provide leadership for its members. Several professional associations provide such support and leadership for business educators, from teacher preparation programs through continuing professional development. The following discussion traces the development of these associations and explains their respective missions.

Association for Career and Technical Education (ACTE)

In 1926, the American Vocational Association (AVA) was founded by the partnering of the National Society for Vocational Education and the Vocational Education Association of the Mid-West. The impetus for this alliance was a need to develop "the national program of vocational education" (Chronology, p. 14) provided by the Smith-Hughes Act of 1917. In 1998 the name was changed to the Association for Career and Technical Education (ACTE). ACTE is the largest educational association in the United States whose purpose it is to prepare individuals for careers. "Its mission is to provide educational leadership in developing a competitive workforce."

This mission is carried out through four purposes:

Professional Development—Encourage career development, professional involvement and leadership among members.

Program Improvement—Foster excellence in career and technical education.

Policy Development—Advocate national public policy to benefit career and technical education.

Marketing—Promote career and technical education to the general public. (www.acteonline.org).

ACTE members are teachers, administrators, guidance counselors, university professors, state/local employees and students at middle, secondary and postsecondary educational levels. ACTE is comprised of 13 divisions: Administration, Adult Workforce Development, Agricultural Education, Business Education, Family and Consumer Sciences Education, Guidance, Health Occupations Education, Marketing Education, New and Related Services, Special Needs, Technical Education, Technology Education, and trade and Industrial Education. Like NBEA, ACTE sponsors an annual convention as well as regional conferences to provide continuing professional development opportunities to its members. ACTE also publishes Techniques which provides information relevant to career and technical educators at all levels.

Delta Pi Epsilon (DPE)

Delta Pi Epsilon is a national graduate honorary society for professionals who support and promote scholarship, leadership, and cooperation toward the advancement of education for business. DPE was founded in 1936 at New York University. The goals of DPE are to foster scholarship in business education through research and its dissemination, to develop and provide leadership, and to encourage and support cooperation among business educators. The following are the objectives of DPE:

1. To improve business education through research;

2. To encourage research;

3. To recognize exceptional research achievement;

4. To publicize research in Business Education.

DPE is governed by an elected body and holds a research conference annually, with the first one held in 1965. It publishes the highly regarded *Delta Pi Epsilon Journal*. The *Journal* was first published as an experiment in 1957 and became a permanent DPE publication in 1959. DPE also publishes the *Instructional Strategies: An Applied Research Series* which provides practical research regarding instruction to its members. In addition, DPE publishes the Business Education Index each year, a complete reference of business education publications in selected journals as well as book titles. Through the DPE Research Award Program, DPE recognizes graduate and independent research each year with an award for the outstanding doctoral dissertation and master's thesis. The dissertations and theses submitted for consideration are evaluated by respected scholars throughout the United States who provide this service anonymously to the membership.

International Society for Business Education (ISBE)

ISBE is the United States Chapter, is the NBEA international division. Its annual conference, held in a different country each year, provides opportunities to learn about international aspects of business education. ISBE has three objectives:

1. To promote the internationalization of business education and training in cooperation with business and professional organizations, educators, and institutions in the private and public sectors.

2. To foster and develop an international multi-lingual network of National Chapters and individuals with an interest in business education and to cooperate with other organizations which have similar objectives and interests.

3. To encourage and maintain links between education and business, both nationally and internationally. (Moore, Anderson, Carlock, Ristau, 2001, p. 189).

National Association for Business Teacher Education (NABTE)

NABTE is the institutional division of NBEA. NABTE was formed via a transition of the National Association of Business Teacher-Training Institutions (initially the National Association of Commercial Teacher-Training Institutions) into the teacher education division of the United Business Education Association in 1949. The name NABTE was formally adopted in 1957. Its membership is comprised of colleges and universities offering business teacher education programs of study approved by their respective states to certify business teachers. The Drexel Institute offered the first business teacher education course in 1898. By 1929, only 30 years later, 138 degree-granting institutions offered business teacher education programs (Hosler, 2000, p. 11). Ironically, in 2000 only about 140 NABTE institutions offer business teacher education programs. Please know, too, that a number of other colleges and universities throughout the U.S. offer business teacher education programs.

Every NABTE institution has a representative who must be a current member of NBEA. Its purpose is to improve the quality of teacher preparation programs through research and practical application. A NABTE Research Conference is included as part of the annual NBEA conference. The association also publishes the *NABTE Review*, a refereed journal, which publishes current research relevant to business teacher educators.

National Association of Supervisors for Business Education (NASBE)

NASBE is an affiliate of both ACTE and NBEA whose members are supervisors of business education and employees of a state, region, or local education agency.

National Business Education Association (NBEA)

NBEA's Vision Statement provides the following statement regarding its mission:

"The National Business Education Association is the world's foremost organization dedicated to:

- The education of individuals to lead and contribute to a business community that is ethical, diverse, inclusive, prosperous, and responsible;
- The advancement of business education at all educational levels; and
- The development of business educators who embrace high ethical standards and personal and professional excellence to ensure that students and adults are afforded equal opportunity to fundamental business knowledge and skills and, therefore, equal opportunity to success in life." (http://www.nbea.org/about/aboutvision.html).

Early in our history, business educators recognized the importance of professional organizations. The Business Educators' Association was organized in 1878 and "was the first organization of any importance to be formed for business educators . . . . The Business Educators' Association was the predecessor of the National Education Association Department of Business Education" (Hosler, 2000, p. 8). The influence of the NEA on business education was significant. Three reports prepared by the NEA on business education in 1903, 1915, and 1919 provided clear evidence of the need for and value of a business education curriculum. In 1933 numerous existing professional organizations recognized the need for unity and formed the National Council for Business Education. In 1946, this group "merged with the NEA Department of Business Education to form the UBEA" (Hosler, 2000, p. 15). The UBEA changed its name to the National Business Education Association in 1962.

NBEA is comprised of five regional associations, an institutional division (NABTE), and an international affiliate (ISBE). It is governed by an Executive

Board of representatives elected from each of the five regions and affiliated organizations. The work of the Association is coordinated by an Executive Director. NBEA headquarters are in Reston, Virginia. The regional associations are:

- Eastern Business Education Association (EBEA). Originally organized as the Eastern Region of the United Business Education Association, the EBEA officially became an NBEA region in 1962.

- Southern Business Education Association (SBEA). Organized as the Southern Commercial Teachers' Association in 1922, the name was changed to SBEA in 1934. SBEA was the first regional association to join the United Business Education Association in 1950.

- North-Central Business Education Association (NCBEA). The predecessor of the NCBEA was the National Commercial Teachers Association, founded in 1895, and which later changed its name to the National Business Teachers Association. It was renamed the NCBEA in 1962 and joined NBEA as an affiliate.

- Mountain-Plains Business Education Association (MCBEA). This, the third regional organization to affiliate with NBEA, was organized in 1952.

- Western Business and Information Technology Educators (WBITE). Originally formed as the Western Business Education Association (WBEA) in 1951, WBEA was the second regional group to affiliate with NBEA. In 1997 the name was changed to the Western Business and Information Technology Educators.

Membership in the regional association is part of membership in NBEA. Each regional association has its own elected administrative board which directs the professional development activities for the region. Additional benefits of membership in NBEA include an annual convention which rotates among the five regions, annual regional conventions, and publications which include the *Business Education Forum, the National Business Education Yearbook*, and *Keying In*, a newsletter.

Pi Omega Pi (POP)

Pi Omega Pi is the national undergraduate honor society for business teacher education. POP was founded at Northeast Missouri State University in 1923. It publishes a quarterly newsletter for members.

Certification

Certification is the process by which an individual becomes licensed to teach in a particular subject area or grade level. All 50 states have various routes to certification; however, common elements include a baccalaureate degree and a competency test. Typical baccalaureate degree programs include a liberal arts core and upper division courses in business education subject matter and professional education, including student teaching. In recent years a number of states have moved to using the Praxis II subject-area test in Business Education as the competency test. The advantage of this test for teachers is its mobility, allowing a person to earn a degree in one state, meet certification requirements there, and move to another state and already have met its certification requirements.

Teaching certification is not a "for life" certification. Certificates must be renewed periodically, such as every five years. States require varying numbers of either graduate credit hours or continuing education units over a specified period of time for teachers to retain their certification.

Typically, colleges and universities use certification guidelines in planning their preservice teacher preparation programs. These programs are reviewed periodically by the associations which accredit them. Several universities throughout the country, typically members of the Holmes Group (an education reform group), require a five-year program of study for teacher education majors. These students earn a baccalaureate degree in their program area, for example, business. Then, in a master's degree program, they take education coursework and student teach.

Summary

The history of business education is a rich one. Clearly it is affected by changes in the economy, technology, and politics. For whatever else may change, the influence of these factors on education and business education in particular will remain constant. For one to understand where business education is today as a area of study, a review of its foundation is critical.

It would neither be appropriate nor possible to review our foundation without also discussing the impact of federal legislation on business education as well as professionalism and its influence. In recent years, Federal legislation has made possible state-of-the-art computer classrooms as well as guidance for developing school-to-work programs of study important for strong business education programs.

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Chapter Two

Effective Administration of Business Education

Fortunately, business education is an area of study appropriate for every grade level and delivery system. Because of our twofold mission to prepare people *for* and *about* business, numerous opportunities exist for developing awareness of and practical application of business education subject matter. The next section discusses the variety of delivery systems for business education and program standards.

Delivery Systems and Standards

In 1995 the National Business Education Association (NBEA) published "National Standards for Business Education: What America's Students Should Know and Be Able to do in Business." These standards were different from previous standards in several ways. First, rather than focusing on individual courses such as Keyboarding or Accounting, the standards were developed around 12 topical areas: Accounting, Business Law, Career Development, Communications, Computation, Economics and Personal Finance, Entrepreneurship, Information Systems, International Business, Interrelationships of Business Functions, Marketing, and Management. Second, within each of the[illegible] 12 areas, performance expectations were developed for four levels: elementary (K-6), middle school/junior high (6-9), secondary (9-12), and postsecondary–community college or technical college (13-14). The value in this approach is the recognition that even in elementary school there are business concepts students can be taught and probably already know. This approach can begin by helping youngsters become aware of sound business practices such as earning an allowance rather than it just being given and learning how and why to save a portion of everything they earn. The thread continues in middle school where students can explore a variety of career options and on into high school where they learn significantly more complex and technical business concepts and their relationship to the world of work.

The NBEA Standards (1995) recommended that when students complete secondary or postsecondary education, they should be able to:

- Function as economically literate citizens through the development of personal consumer economic skills, a knowledge of social and government responsibility, and an understanding of business operations.

- Demonstrate interpersonal, teamwork, and leadership skills necessary to function in multicultural business settings.

- Develop career awareness and related skills to enable them to make viable career choices and become employable in a variety of business careers.

- Select and apply the tools of technology as they relate to personal and business decision making.

- Communicate effectively as writers, listeners, and speakers in social and business settings.

- Use accounting procedures to make decisions about planning, organizing, and allocating resources.

- Apply the principles of law in personal and business settings.

- Prepare to become entrepreneurs by drawing from their general understanding of all aspects of business.

- Understand the interrelationships of different functional areas of business and the impact of one component on another.

- Develop the ability to participate in business transactions in both the domestic and international arenas.

- Develop the ability to market the assets each individual has whether they be in the labor market or in the consumer goods market.

- Manage data from all of the functional areas of business needed to make wise management decisions.

- Utilize analytical tools needed to understand and make reasoned decisions about economic issues–both personal and societal (NBEA, 1995, pp. 2-3).

The clear message from this list of what all students should know about business is that business education is sound education for **everyone**. In some way or another, every person has business dealings, whether as a consumer or a member of the workforce. Business education programs at every level provide a solid foundation for this knowledge.

Another important aspect of the NBEA Curriculum Standards model is the focus on developing solid workplace skills. Career strategies including self-assessment approaches and goal development are included for each of the 12 standards.

Elementary Level

Much of what children know about business prior to formal coursework is learned through experiences with their parents, families, and other children. Even before coming to pre-kindergarten, many children take care of their possessions and money they've gotten from grandparents, aunts and uncles, and the "Tooth Fairy!" Often patterns developed at this early age carry through to adulthood. Thus, elementary school provides a marvelous opportunity to learn how to care for one's belongings, one's assets.

Early childhood and elementary school teachers can provide multiple situations where children can learn about business practices such as good work habits, buying and selling goods and services, and being a good employee and/or employer. Perhaps early in one's education is the best place to begin to learn two of the most valuable workplace skills: a strong work ethic and sound basic skills. Learning responsibility in getting work completed on time, working well with others, and communicating effectively can all be easily blended into any subject taught in elementary school.

Because of the increasing availability of computer technology in the elementary school, learning correct keyboarding skill is a valuable tool to be taught and learned as early as the fifth grade. Increasingly, school districts are moving keyboarding from the high school and middle school levels to the later elementary grades. At the fifth grade level, students have the language and motor skills required to learn correct keystroking. The light keystroke touch needed by the computer keyboard eliminates the old concern of youngsters' fingers not being strong enough to learn the skill at an earlier age!

Critical to the legitimate acquisition of keyboarding skills is that sufficient time on a regular basis be devoted to the skill development. Sufficient time translates into having students in keyboarding classes on a daily basis for a minimum of six weeks. These keyboarding classes should also be taught by someone with formal training to do so, a business education teacher. Often lines of certification preclude business education teachers from teaching at the elementary school level.

Middle School

Middle school can provide exploratory programs in business education, help with career guidance, develop sound consumer practices, and stimulate interest in business education as an area of study.
Exploratory programs are designed to provide students with the opportunity to experience a number of topics which may be studied in depth later in high school and beyond. Under the business education umbrella, these topics often include keyboarding, computer technology, and bookkeeping/accounting. As many of these exploratory experiences are short, lasting six to eight weeks and **not** necessarily meeting every day, they typically do not provide sufficient time on task for real skill acquisition. Their purpose, however, is to acquaint students with topics they may choose to pursue later. Middle school students have opportunities to take exploratories in many if not all the career and technical education program areas. Exploratories provide opportunities for middle school youth to learn about areas of work, to learn decision-making skills, and to relate or compare career requirements and rewards to their own ambitions, values, and expectations (Issacson, 1985; Zunker, 1994).

An additional value of these exploratory courses is the reinforcement of good work habits and consumer skills that were nurtured at the elementary school level. These habits and skills include completing work on time, good citizenship, and wise spending and saving.

There is a need at this level, too, for teachers of exploratory classes to be appropriately prepared. State teaching certification rules can impact this situation. Middle schools typically include grades six, seven, and eight. States offering a middle school certification would not necessarily require business education preparation for those teaching business education. Business education certification in some states, Georgia for example, includes grades 7-12. This permits appropriately prepared business education instructors to teach the business exploratory classes.

High School

Nearly everyone has an opinion as to the educational experiences young people need today–not a new phenomenon. In 1918 the Commission on the Reorganization of Secondary Education identified seven "Cardinal Principles of Secondary Education" (Nanassy, Malsbary & Tonne, 1976, p. 11). The following were deemed appropriate goals for secondary school students:

1. Health–the school should contribute to meeting the health needs of the individual and the race.
2. Command of Fundamental Processes–each child should develop the ability to read, to express himself orally and in writing, and to compute.
3. Worthy Home Membership–each child should develop those qualities that make him a worthy member of the family unit.
4. Vocation–every person should be equipped to secure a livelihood for himself and for those dependent upon him, and education should equip him to serve society in a productive manner.
5. Civic Education–the individual should be helped to develop those qualities which will make him a desirable member of his community.
6. Worthy Use of Leisure–every person should secure from his leisure the maximum in enjoyment and provide for the recreation of body and mind.
7. Ethical Character–education should assist the individual in the development of fair and honest attitudes in his dealings with others and the development of moral values (p. 11)

Twenty years later, the Educational Policies Commission of the National Education Association (NEA) publishedthe objectives of education:

1. The *Objective of Self-Realization* which includes developing the inquiring mind; gaining proficiency in speaking, reading, writing, and the use of numbers in solving problems; acquiring health knowledge, health habits, and the like.

2. The *Objective of Human Relationship* which includes developing respect for humanity, friendships, cooperation, courtesy, appreciation of the home, conservation of the home, and democracy in the home.

3. The *Objective of Economic Efficiency* which includes developing desirable attitudes toward social justice, social activity, social understanding, critical judgment, tolerance, social applications of science, world citizenship, law observance, economic literacy, political citizenship, and devotion to democracy" (Nanassy, Malsbary & Tonne, 1976, p. 11).

The Cardinal Principles and the three NEA objectives are aligned in purpose.

Some 50 years after the NEA recommendations were published, two groups identified needed workplace competencies for the 21st century. Scott and Sarkees-Wircenski (1996) reported on *Workplace Basics: The Skills Employers Want*, published by the American Society for Training and Development, which identified the following seven skill groups:

1. Foundation–Learning to Learn

2. Competence–Reading, Writing, and Computation

3. Communication–Listening and Oral Communication

4. Adaptability–Creative Thinking and Problem-Solving

5. Personal Management–Self Esteem, Goal Setting/Motivation, and Personal/ Career Development

6. Group Effectiveness–Interpersonal Skills, Negotiation, and Teamwork

7. Influence–Organizational Effectiveness and Leadership (p. 6).

Scott and Sarkees-Wircenski (1995) also reported on the 1992 Secretary's Commission on Achieving Necessary Skills (SCANS) Report *Learning a Living: A Blueprint for High Performance*. The SCANS Report identified a combination of foundation skills and workplace competencies as requirements for effective job achievement. The foundation skills include:

- Basic Skills–reading, writing, arithmetic, and mathematics, speaking, and listening

- Thinking Skills–the ability to learn, to reason, to think creatively, to make decisions, and to solve problems

- Personal Qualities–individual responsibility, self-esteem and self-management, sociability, and integrity (p. 7).

The workplace competencies include:

- Resources–know how to allocate time, money, materials, space, and staff

- Interpersonal Skills–work on teams, teach others, serve customers, lead, negotiate, and work well with people from culturally diverse backgrounds

- Information–acquire and evaluate data, organize and maintain files, interpret and communicate, and use computers to process information

- Systems–understand social, organizational, and technological systems; monitor and correct performance; and design and improve systems

- Technology–select equipment and tools, apply technology to specific tasks, and maintain and troubleshoot equipment (p. 7).

Ironically–or perhaps not–the content of these aforementioned lists developed over nearly a 75-year period are amazingly similar. All of these recommended objectives for secondary education students also align with the twofold mission of business education to prepare people *for* and *about* business. Clearly, though, the means through which these objectives are met have been changed drastically for today's business education student!

Business education students of 50 or 75 years ago would find themselves learning shorthand, commercial history, typewriting, commercial mathematics, office practice, and office machines– including the dreaded comptometer! Secondary business education students in the early 21st century study accounting, business law, office management, entrepreneurship, and a myriad of computer technology and applications courses. Any number of work-based learning opportunities such as cooperative business education, internships, and apprenticeships complement the course offering. Courses offered at this level provide opportunities for development of skills, knowledge, and attitudes appropriate for entry-level employment as well as education for wise consumerism and responsible citizenship.

A well-developed program of study for the secondary business education student will enable the student to move easily and successfully into the workforce upon graduation. However, a dilemma may arise when looking at some reform efforts affecting required coursework at the secondary level. Often in response to declining standardized test scores, both state and local school boards are increasing graduation requirements in the hope of increasing test scores. Increasing graduation requirements often translate into added math, science, and English requirements which frequently result in a reduction of the number of elective courses taken. Business education courses may be directly affected by this action as business courses are rarely required. Since business education courses typically are electives, secondary business education faculty are challenged to establish clearly the value and worth of business education courses both while the student is in high school and after graduation.

Standards for these business education programs emanate from several sources. State departments of education develop standards, often using something similar to the NBEA Standards previously discussed. State standards may also be influenced by accrediting agencies such as the Southern Association for Colleges and Schools which accredits public schools throughout the Southeastern United States. Within states individual program areas may also develop more stringent industry standards which individual schools may choose to meet. Developing industry-based standards is a common practice across the career and technical education program areas.

Postsecondary Education

Business education at the postsecondary education level may be studied at a community college and/or technical college or a college or university. The missions of these delivery systems are very different. The mission for the community college and/or technical college is specific workforce preparation. In fact, frequently technical college programs are designed specifically to meet employment needs of a particular local business or industry. Students who study at these institutions may enroll in programs that award diplomas, certificates, or associate degrees. Admission criteria often vary by institution and program of study. However, high school students who have participated in a tech prep program will find their transition into postsecondary education a smooth one which avoids duplication of coursework.

Often programs of study at the technical college are developed to meet strict industry standards. The inclusion of industry standards increases the value of the program and the ease of student employment as many technical colleges require a paid internship or apprenticeship in programs of study.

Postsecondary education also includes the college and university settings where baccalaureate, master's, and doctoral degrees are offered. The programs of study in business education offered at the university level prepare individuals to become classroom teachers, master teachers, and teacher educators. Programs of study at these levels may also prepare people to enter the workforce as human resource professionals.

Business/Industry Training

Lifelong learning is critical to employment success for business professionals in every setting. Millions of dollars are spent every year in providing continuing education for business employees. Much of this education is conducted in-house which means employees do not leave the workplace. Large firms may employ their own trainers who conduct the classes. These sessions may take place in onsite classrooms or at an individual's workstation. Firms may also hire consultants to provide specific training periodically or as the need arises. Businesses may also develop relationships with equipment and software vendors who will provide training free of charge when their products are purchased.

Increasingly businesses are seeing the value and investment return in providing tuition reimbursement plans for their employees. Financial support such as tuition reimbursement may enable employees to remain in their jobs while working on a related degree and having their employer pay for the coursework. Reimbursement may cover all tuition and fees regardless of the grade earned, or the reimbursement may be prorated based on the grade earned, e.g., 100% for an A, 80% for a B, etc.

Business education graduates of technical colleges with strong computer skills are often highly sought after as in-house trainers, as are graduates of college and university programs. In fact, many highly-trained technical college students are hired by businesses before they are able to complete their programs of study.

Student Organizations

Vocational student organizations enrich classroom learning and so are often referred to a co-curricular activities. As Scott and Sarkees-Wircenski (1996) stated, "The mission of vocational student organizations is to provide the best learning environment and preparation possible so students can enhance their leadership and technical skill development in their chosen occupational areas" (p. 167). These organizations have long played an important role in extending the development of young people beyond the classroom. While not mentioned specifically in the Smith-Hughes Act of 1917, this first vocational legislation provided funding for training teachers whose responsibilities would ultimately include advising and supervising vocational student organizations. Federal support continues today via the 1998 Carl D. Perkins Vocational-Technical Education Act Amendments that allow for local funds to be used to support vocational student organizations.

Membership in student organizations provides many benefits for students. Harris and Sweet and Vaughn, Vaughn, and Vaughn (as reported in Scott & Sarkees-Wircenski, 1996) stated the following as benefits of vocational student organizations: civic responsibility, leadership skills, social skills through committee work and recreational activities, respect for the dignity of work, recognition and prestige, employability skills, and sense of independence and accomplishment. Business education students have two student organizations from which to choose: Future Business Leaders of America and/or Business Professionals of America.

Future Business Leaders of America

In 1942 the National Council for Business Education sponsored the first Future Business Leaders of America (FBLA) chapter in Johnson City, Tennessee. Four years later the sponsorship was transferred to the then-UBEA, now NBEA. And in 1969, FBLA became an independent association. In 1958, Phi Beta Lambda, a collegiate division of FBLA was organized. Scott and Sarkees-Wircenski (1996) stated the purpose of FBLA-PBL is "to provide . . . opportunities for students in business and office education to develop vocational and career supportive competencies, and to promote civic and personal responsibilities" (p. 188). FBLA-PBL headquarters are in Virginia. This is the contact information:

FBLA/PBL, Inc.
1912 Association Drive
Reston VA 22091
1-703-860-3334,.FAX 1-703-758-0749

Business Professionals of America

Founded in 1966 as the Office Education Association, the name was changed to Business Professionals of America in 1988. Its purpose is to "develop leadership abilities, interest in the American business system, and competency in office occupations" (Scott & Sarkees-Wircenski, 1996, p. 191). Its overarching mission is to contribute to the preparation of a world-class workforce. This is the contact information:

Business Professionals of America
National Center
5454 Cleveland Avenue
Columbus OH 43231
1-614-895-7277 or 1-800-334-2007; FAX 1-614-895-1165

When planning for establishing a student organization, it is important to keep the organization accessible to all students by keeping dues reasonable, by holding meetings when students are able to use school transportation, by including all members in activities, by securing a sound funding base and fund-raising mechanism to assure the financial well being of the club. A key individual to any student organization's success is the advisor. This person is key in developing enthusiasm and support for the club and is crucial in effective program planning. Student organizations are also excellent ways to increase enrollment in business education courses.

Related Work Experience

Appropriate and supervised work experience can nicely complement in-class learning. For work experience to be most beneficial, it must be related directly to the student's program of study and educational goals. Business education students may take advantage of cooperative education, internships, or apprenticeships. While most of these are paid work experiences, business education students may also participate in unpaid work experiences such as community service learning situations. Again, Federal legislation has influenced the form and context of work experience for students.

The Education Amendments of 1976 (Public Law 94-482) provided for part-time work for youths who needed employment to continue their vocational education. The Amendments defined cooperative education as follows:

> The term "cooperative education" means a method of instruction of education for individuals who, through written cooperative arrangements between a school and employers, receive instruction, including required academic courses and related vocational and technical education instruction, by alternation of study in school with a job in any occupational field, which alternation shall be planned and supervised by the school and em-

> ployer so that each contributes to the education and employability of the individual, and may include an arrangement in which work periods and school attendance may be on alternate half days, full days, weeks, or other periods of time in fulfilling the cooperative program. (American Vocational Association, p. 88).

A key element in the value and success of the co-op experience and other work experiences is the coordinated aspect. Specific expectations in writing are provided to the student and employer. These expectations emerge from the students' coursework and career aspirations. In addition, these work experiences are monitored by the high school co-op teacher for assurance of quality work experience. Typically students enrolled in a cooperative education program are in classes in the morning and in the workplace in the afternoon. Students typically are required to sign a list of requirements for their co-op experience. Participating employers may also be required to sign some kind of training agreement. Sample forms used by one high school follow the reference list for this chapter. These forms clearly spell out responsibilities for students, parents, employers, and teachers.

The purpose of the School-to-Work Opportunities Act of 1994 (STWOA) (PL 103-239) was to provide a framework to partner education and industry to prepare a highly skilled workforce. The anticipation was that the school-to-work programs would further encourage integration of vocational and academic courses as well as integrating school-based and work-based learning. The three components of the STWOA are school-based learning, work-based learning, and connecting activities. Work-based learning includes "paid or non-paid work experience, job training, workplace mentoring, instruction in workplace competencies, instruction in all aspects of the industry" (Scott & Sarkees-Wircenski, 1996, p. 158).

The Carl D. Perkins Vocational and Technical Education Act of 1998, more commonly referred to as the "Tech-Prep Education Act," included provisions for work-based learning. The act requires the following:

- Combines at least two years of secondary and two years of postsecondary education in a sequential course of study without duplication of coursework.

- Integrates academic, vocational and technical education and, if appropriate and available, work-based learning.

- Provides technical preparation for careers.

- Builds student competence in core academic and technical areas.

- Leads to an associate or a baccalaureate degree or a postsecondary certificate in a specific career field.

- Leads to placement in appropriate employment or further education. (American Vocational Association, 1998, p. 79).

The Tech-Prep Act provides an excellent opportunity for business education students to begin a focused program of study at the secondary level, including work-based learning, and continuing at the postsecondary level. This kind of learning experience increases employment opportunities available later.

Teachers involved in work-based learning must be familiar with federal laws protecting youths who are employed. Employment of students is regulated by the child labor provisions of the Fair Labor Standards Act of 1938 as amended. The Act includes the following stipulations regarding permissible jobs and work hours, by age, in nonfarm work:

- Youths 18 years or older may perform any job for unlimited hours;

- Youths age 16 and 17 may perform any job not declared hazardous by the Secretary of Labor, for unlimited hours;

- Youths age 14 and 15 may work outside school hours in various nonmanufacturing, nonmining, nonhazardous jobs under the following conditions: no more than 3 hours on a school day, 18 hours in a school week, 8 hours on a nonschool day, or 40 hours in a nonschool week. In addition, they may not begin work before 7 a.m. nor work after 7 p.m., except from June 1 through Labor Day, when evening hours are extended until 9 p.m. Youths aged 14 and 15 who are enrolled in an approved Work Experience and Career Exploration Program (WECEP) may be employed for up to 23 hours in school weeks and 3 hours on school days (including during school hours). (http://www.dol.gov/dol.asp/public/programs/handbook/childlbr.htm

Students may also choose to participate in unpaid work experience. Increasingly this is referred to as academic service learning. Academic service learning provides a situation where students are involved in the community in a way to reinforce academic learning as well as increase the breadth of their experiences. Students may volunteer at a Senior Citizen Center, a local library, or at after-school programs.

Work-related experience, whether paid or unpaid, provides rich opportunities for students to reinforce in-school learning and expand the depth and breadth of their life experiences. One key is that they are directly connected to their programs of study and are guided by both school personnel and work-site personnel. The other critical element is selection of work sites for students. Only those firms committed to providing real learning situations for students should be selected. Employers need to have a clear understanding of the need for students to be appropriately trained in the skill areas they are assigned. Effective communication with employers requires planning and preparation. Developing a cadre of committed business professionals will require time and evaluation. This investment, however, will reap a huge return in terms of rich work-based learning experiences for involved business education students.

The value of work-based learning to student and employer is great. "Not only does this help them begin to take control of their own futures, it also clarifies the relationship between what they study in school and what will be required of them when they enter the labor force and helps them choose courses more appropriately while still in school" (Northdurft, 1990, p. 13). Employers who participate have a distinct advantage in that they will know the personal qualities and technical abilities of the with whom they had been working. In this report from a youth apprenticeship conference, Hans W. Decker, President of Siemens USA, stated, "Developing technical skills is important, but just as important are learning to take initiative, developing a sense of personal responsibility, making decisions, learning how to learn, loyalty to other people, to work, and to a company, and understanding the importance of quality" (Northdurft, p. 13).

Advisory Committees

Advisory committees can be a rich source of input, evaluation, and support for business education programs at every level. These committees may often be used in the development, implementation, and evaluation of programs of study. They are typically comprised of parents, students, business partners, and where possible college/university faculty. In fact the Education Amendments of 1976 required state and local advisory committees for any state receiving federal funding for vocational education.

Several key points should be remembered in developing an advisory committee. First, the size of the committee is driven by its mission. Remember the larger the group, the more difficult it will be to determine a convenient meeting time for everyone. Often a smaller committee can work more quickly and achieve consensus. Representativeness and homogeneity are also important committee qualities. The committee should have representation from **all** the concerned or affected constituencies. Including individuals from disparate positions can make for contentious meetings. "In general, groups require balance in status and expertise rather than homogenity" (Lehman & Dufrene, 2002, p. 62). For example, it would be unwise to include a president or general manager of a large business with an entry-level secretary or first-level supervisor on an advisory committee.

Key to selection of persons is their interest in the programs they have been invited to advise. Often individuals who have worked with students in work-based learning programs are eager and willing to serve as they have a vested interest in the success of the educational program. Advisory committee members may serve a variety of functions. The following are a sample:

- Serve as guest speakers.
- Review instructional materials and curriculum changes.
- Provide financial support to programs and student organizations.
- Provide publicity regarding the business education programs to the community.

When deciding to constitute an advisory committee, it is important to have a clearly defined program of work. Typically, the committee members will be busy people who are happy to share their time for meaningful work.

Program Evaluation

Just as evaluation is key to effective learning and instruction, it is also an important aspect in the development and continuation of effective business education programs. In fact, Federal legislation often requires program evaluation as a link with Federal funding. Typically the two areas evaluated are the administration of the program and the instructional areas of the program.

Included under the administrative umbrella are curriculum and instruction, faculty, support staff to include guidance counselors, community relations, and the physical plant and equipment (Schrag & Poland, 1987). The instructional areas include all the courses offered in the program as well as any work-based learning components. Program evaluation by its very nature should result in improved planning processes, improved program development and implementation, and increased accountability for both students and faculty. Obviously, for evaluation to be worthwhile, clearly stated objectives must be in place.

Schrag and Poland (1987) recommended a three-part model of input, process, and output. Input, or what goes into the program, may include resources (tangible and fiscal), curriculum, and students, teachers, and administrators. Process includes all aspects of teaching and learning. Output describes the students when they leave the program in terms of academic achievement, basic and occupational skill development, and job placement where appropriate.

Data regarding these three areas may be gathered via telephone or mail surveys, focus groups with parents and business partners, follow-up studies of graduates, and employer surveys. Follow-up studies can be particularly useful in determining not only what happens to students after they graduate but also their impression of the effectiveness of the program. Employer surveys can also be helpful in making decisions about computer hardware and software acquisition as well as learning about needed employability skills.

Feedback from constituencies can provide useful information in evaluating business education programs. The purpose of evaluation is program improvement which should lead to increased student achievement.

Summary

Business education is appropriate education at every level and for a variety of delivery systems. While specific goals appropriately vary from elementary school to postsecondary education, the twofold purposes of business education, for and about business, remain constant. A variety of ancillary services such as student organizations, related work experience, and advisory committees are needed to provide the best learning opportunities both in and out of the classroom for business education students. Finally, continuing program evaluation works to insure the maintenance of high standards required for the high-tech, high-skill workplace of the 21st century.

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Oconee County High School
Cooperative Business Education Co-Op Agreement
2000-2001

The cooperative work-experience programs are planned to develop a student academically, economically, and socially.

In order to participate in the cooperative work program, a student must be enrolled and/or have completed business education courses that deal with job-related studies and leadership development activities. An average of **FIFTEEN** hours per week at the work station is required for one period of co-op. An average of **TWENTY** hours per week at the work station is required for two periods of co-op.

Acceptance to the cooperative work program by the coordinator will be made without regard to race, creed, color, religion, or sex. As a condition for acceptance to the co-op program, I will agree to and abide by the following policies.

1. To follow all school policies/rules and know that I am under the jurisdiction of the school while at the training station.
2. To budget time to meet the responsibilities of school, work, recreation, and rest.
3. Not to go to work when absent from school (excused or unexcused) without prior approval from coordinator.
4. That if assigned to detention, ISS, or to alternative program, I understand that I will not be released early for work.
5. That the coordinator is the recognized authority for adjustments or changes at any training station, and I know I must have prior approval from the coordinator before any changes are made.
6. That if I am fired or lose my job through my own negligence, I could be dropped from the program and receive no credit. In addition, I must remain at school until 3:20 p.m.
7. Must be 16 years old, secure a social security card, and a work permit.
8. To be rescheduled into four classes a day if I am not employed prior to the last day of schedule changes.
9. To record the hours worked each day on my wage/hour report and give coordinator monthly earnings. Check stubs must be given to validate earnings. Falsifying information will cause me to lose credit for co-op work grade.

10. To inform coordinator if I have a new supervisor or any changes in my job, rate of pay, hours of work, or duties.

11. To provide two week's notice when terminating a job after coordinator's approval. I must continue my co-op program for the entire semester employed. I understand that I must remain with my original employer the entire school year unless circumstances dictate otherwise.

12. To work a minimum average of fifteen or twenty hours (depending on number of co-op periods to receive co-op work credit, regardless of extracurricular activities.

13. To receive no credit for co-op work if I am absent from school for more than ten days in a semester (or school policy stated).

14. To be given one day's notice from a teacher when school work has failed to be completed. I will be required to stay after school each day until work is completed. I will notify my employer in advance that I will be late and why.

15. To be evaluated each nine weeks by employer and coordinator.

16. Vocational youth organizations have proven to be an important asset of a student's training. I understand that I am *encouraged* to be a member of and participate in FBLA. FBLA dues are $15.00.

17. To inform coordinator of any unpleasant job situation.

18. To represent my school, my employer, the business education program, and myself by observing business rules of conduct, honesty, punctuality, courtesy, cooperative attitude, proper health and grooming habits, appropriate dress, and willingness to learn.

19. I must pass the co-op course each semester to remain in the co-op program.

20. In appreciation of your employer, the co-op work programs will be participating in an employer appreciation function. I understand that attendance is mandatory and my grade will be affected if not in attendance at the appreciation function. Dues are $15.00.

21. To sign out with coordinator upon leaving school campus each day and not to return to campus without prior approval from coordinator.

22. *I agree to abide by the rules listed above during the time I am enrolled in the CBE Co-op course.*

STUDENT SIGNATURE ______________________________ Date____________

My child has permission to participate in the cooperative work program, and I agree to cooperate with the coordinator so that the above rules will be carried out by my child. I agree to assume responsibility for my child's conduct and travel safety.

PARENT SIGNATURE________________________________ Date ____________

COORDINATOR'S SIGNATURE ______________________ Date ______________

Oconee County High School
School-to-Career Programs
Educational Training Agreement

Student name ______________________________

Employer address ______________________________

Work-Based Training Supervisor ______________________________

Work phone number ______________________________

The Student Agrees:

1. To be 16 years of age and to have a Social Security number.
2. To secure a work-permit if under 18 years of age and to file a copy with the school office, state Department of Labor, and the employer. Work permits can be obtained from the school office and documentation of birth date must be provided.
3. To assist the work-based learning coordinator in finding an appropriate employment position related to the career focus area of the program and the career objective of the student.
4. To provide transportation to and from work.
5. To attend school and work regularly and not go to work without first going to school, or go to school without going to work, unless previously discussed with the work-based coordinator. Failure to adhere to this part of the agreement may result in the student receiving appropriate academic and/or disciplinary action. If a student will be absent from school or work, the work-based learning coordinator should be notified by 12:00 PM.
6. To discuss all aspects of the employment with the work-based learning coordinator and the work-site supervisor–not with other students, coworkers, etc.
7. To represent the school and employer by demonstrating honesty, punctuality, courtesy, and a willingness to learn. If the student is dismissed from employment due to negligence or misconduct, the student will be dropped from the work-based learning program and not receive academic credit.
8. To work a minimum of 15 hours a week.
9. To make employment changes only with the approval of the work-based learning coordinator. The work-based learning coordinator reserves the right to change the student's employment situation if necessary.
10. To be evaluated by the work-based learning coordinator and the work-based training supervisor a minimum of once per grading period.
11. To be aware that employment in the work-based learning program does not quality a student to receive unemployment compensation.
12. To submit to the work-based learning coordinator a weekly record indicating activities engaged in at the work-site and total hours and salary earned during the week.

13. To allow the release of student records regarding academic performance, attendance, and discipline for the purpose of employment and program follow-up.

The Parents/Guardian of the Student Agree:

1. To encourage the student to carry out effectively his/her duties and responsibilities at both the school and the place of employment.
2. To assume responsibility for the conduct and safety of the student from the time he/she leaves school until he/she reports to work; likewise, from the time he/she leaves his/her job until he/she arrives home.
3. To make inquiries concerning the student's training, wages, or working condition through the work-based learning coordinator rather than directly to the employer.
4. To understand that the student must attend school and work regularly and not go to work without going to school, nor go to school without going to work unless previously approved by the work-based learning coordinator.
5. To offer assistance to the work-based learning coordinator, serve as a resource person, and/or aid in other ways that could benefit the school and the student.
6. To allow the release of student records regarding academic performance, attendance, and discipline for the purpose of employment and program follow-up.

The Employer/Work-Site Supervisor Agrees:

1. To provide a variety of work experiences for the student that contribute to the attainment of his/her career objective.
2. To employ the student for at least 15 hours per week during the academic year.
3. To adhere to policies and practices which prohibit discrimination on the basis of race, color, national origin, sex, and handicap in recruitment, hiring, placement, assignment to work tasks, hours of employment, levels of responsibility, and pay.
4. To provide instructional materials and occupational guidance to the student.
5. To evaluate the student, in consultation with the work-based learning coordinator, a minimum of once per grading period.
6. To adhere to all federal and state regulations including child labor laws and minimum wage regulations. Students employed through a work-based learning program are not eligible for unemployment compensation.
7. To adhere to income tax and Social Security withholding regulations.
8. To provide time for consultation with the work-based learning coordinator concerning the student and to discuss with the work-based learning coordinator any difficulties that may arise.
9. To inform the work-based learning coordinator before any disciplinary action is taken in regard to the employment of the student.

The School-Based Coordinator Agrees:

1. To assist in the academic and occupational instruction of the student.
2. To conduct supervisory visits to the student's place of employment.
3. To render assistance with educational and training programs of the student.
4. To assist the work-based training supervisor in an evaluation of the student's performance a minimum of once per grading period.
5. To maintain records pertinent to the student, the employer, and the school.

I have read the above agreement and will carry out the responsibilities delegated to the best of my ability.

Student signature ______________________________ Date ____________

Parent/Guardian signature ________________________ Date ____________

Employer signature _____________________________ Date ____________

Work-Based Coordinator signature _________________ Date ____________

Chapter Three

Effective Planning for Instruction

Planning is important for the success of any venture. How many would think of getting in the car on the first day of vacation and looking at each other ask, "So where shall we go?" Many people spend weeks, even months planning for a week or two of vacation. After all, much is at stake: our time, our money, and our anticipation of rest, relaxation, and a good time.Yet what is at stake in planning for instruction is far, far greater than what is at stake in planning for a vacation. Yet, like planning for a vacation, careful, focused planning for instruction can have far-reaching effects both on the teacher and, more importantly, on the learner. This chapter focuses on four key aspects in effective planning for instruction: learning theory, factors to consider in planning for instruction, establishing and sequencing objectives, and selecting appropriate assessment strategies. Instructional strategies are addressed in Chapter Four.

Learning Theories

Bott (1998) stated that much has been written regarding definitions of learning, most would agree "that an event of learning includes a *relatively permanent change* that can be *observed in the behavior* of a person that comes about as a *result of interaction with the environment*" (p. 39). The road to effective planning for learning, however, requires a perusal of theories which have and continue to influence how educators plan for instruction as well as newly developed theories influencing educational practice today.

Several early learning theories and theorists dominated until the mid-1960s. As these theories provided a foundation for much educational development in this country, a review of several is important.

Thorndike's Connectionism

Thorndike's basis for learning rests in an association between "sense impressions and impulses to action (responses)" (Hilgard & Bower, 1975, p. 28). As the basis for this theory lies in the connection between sense impressions and responses, the system is often referred to as "connectionism," and is the "original stimulus-response or S-R psychology of learning" (p. 28). More simply put, one learns by incorporating correct responses and discarding incorrect responses.

Pavlov's Classical Conditioning

Many of us have heard of Pavlov's classical dog experiment. When the dogs in the experiment were fed, they salivated. The food was the *unconditioned stimulus* and the salivation was the *unconditioned reflex* (or response). Over time, when food appeared for the dogs, a light would come on. Shortly, the appearance of light evoked salivation *without* the food; the dogs became conditioned to expect food when the light came on and thus salivated as *conditioned reflex*.

Skinner's Operant Conditioning

Skinner used basic tenets of Thorndike's and Pavlov's theories as a basis for understanding more complex forms of behavior. He was an ardent protagonist of *behaviorist methodology*. "He rejects mentalistic or 'cognitive' explanations of behavior, or explanations attributing behavior causation to 'inner psychic' forces of any kind. Skinner argues that we understand a piece of behavior only when we have learned how to predict and control that behavior" (Hilgard & Bower, 1975, pp. 206-207).

Piaget's Developmental Psychology

While we often connect Piaget and learning theory, some suggest that is an inappropriate connection. Piaget differs from other theorists in that he viewed a larger context of learning or the acquisition of knowledge "as a consequence of growth and interaction with the physical and social environment" (Hilgard & Bower, 1975, p. 318).

Social Learning Theory

Developed by Albert Bandura, social learning theory attempts to balance cognitive psychology with principles of behavior modification. Social learning theory incorporates effects and evolution of social and personal competencies. These competencies emanate from social conditions in which learners find themselves and from which they learn (Hilgard & Bower, 1975). Learning by direct experience is emphasized in social learning theory.

Contextual Teaching and Learning

Historically one of the criticisms of public education is its disconnect with the world outside the classroom. Many people, educators among them, assumed what one learned in a classroom would easily and automatically transfer to problems and situations encountered outside the classroom. Experience and research show that transfer typically does not happen. Learning, in fact, is often decontextualized. Brown, Collins, and Duguid (1989) argued that knowledge is situated, that it is connected, or more simply is a part of the context in which it is developed and subsequently used. These authors further stated, "The activity in which knowledge is developed and deployed, it is now argued, is not separable from or ancillary to learning and cognition. Nor is it neutral. Rather, it is an integral part of what is learned" (p. 32). From this concept of situated cognition, or learning in context, emerged the concept of contextual teaching and learning. Sears and Hersh (1999) reported contextual teaching and learning (CTL) provides a framework teachers can use to connect in-class learning with out-of-class situations. This connectivity may motivate students to better see and understand how what they learn may be applied in their lives. The six characteristics of CTL are that it:

1. is problem based.

2. occurs in multiple contexts.

3. fosters self-regulated learning.

4. anchors teaching and learning in students' diverse life contexts.

5. utilizes interdependent learning groups.

6. employs authentic assessment. (p. 74).

The CTL approach is student centered. It acknowledges and values the knowledge they bring to the classroom and embraces the idea that good, effective learning takes place in a variety of settings. So what a person learns, e.g., specific knowledge and skills, is significantly enhanced if that learning takes place in the context in which it will ultimately be used. Assume, for example, a child wants to learn to keyboard text. A teacher can describe correct keystroking techniques, can display a keyboarding chart showing which fingers strike which keys and can demonstrate correct keystroking techniques. However, the only way students will learn correct keystroking is to place their hands on a keyboard and practice.

While the term CTL may be new to business educators, learning in context, albeit simulated context, has long been a part of our curriculum. Many business education students have completed simulations in courses such as accounting, office procedures, and records management. These valuable learning situations enable students to apply what they know and are able to do in a simulated setting prior to their participating in cooperative business education or actually joining the workforce full time.

Multiple Intelligences

For nearly 100 years the educational community has accepted the notion that "intelligence" was something that could be measured and translated into a number or an IQ score. In the early 1980s a psychologist, Howard Gardner, challenged this belief. Gardner viewed intelligence as having "more to do with the capacity for (1) solving problems and (2) fashioning products in a context-rich and naturalistic setting" (p. 2). Four key points in multiple intelligences theory are:

1. Each person possesses all seven intelligences.
2. Most people can develop each intelligence to an adequate level of competency.
3. Intelligences usually work together in complex ways.
4. There are many ways to be intelligent within each category.

At the outset, Gardner established seven categories or intelligences. They are:

1. Linguistic intelligence: The ability to use words effectively whether orally or in writing
2. Logical-mathematical intelligence: The capacity to use numbers effectively and to reason well.
3. Spatial intelligence: The ability to perceive the visual-spatial world accurately.
4. Bodily-kinesthetic intelligence: Expertise in using one's whole body to express ideas and feelings.
5. Musical intelligence: The capacity to perceive, transform, and express musical forms.

6. Interpersonal intelligence: The ability to perceive and make distinctions in the moods, intentions, motivations, and feelings of other people.

7. Intrapersonal intelligence: Self-knowledge and the ability to act adaptively on the basis of that knowledge. (Armstrong, pp. 2-3)

Gardner " . . . seriously questioned the validity of determining an individual's intelligence through the practice of taking a person out of his natural learning environment and asking him to do isolated tasks he'd never done before–and probably would never choose to do again" (Armstrong, 1994, p. 1). The real value of business education courses is that all learning centers around knowledge, skills, and abilities students will need to be successful as private citizens and members of the workforce.

Even this brief perusal of established and newer theories of learning and intelligences support the idea that people learn in different and varying ways. They may even learn differently in different settings. The important point to remember from these theories of learning is the clear move away from viewing learning as something that is done *to* a learner and the move toward viewing learning and the learner as inextricably intertwined, inseparable, if you will, in the learning process.

Planning for Instruction

Planning is the keystone of effective instruction and a requirement for learning to happen. Units and daily lessons that are well planned can both affect and effect student learning. Yet, for however important planning is, it is often looked upon as drudgery–a necessary evil in teaching! Many people are willing to develop elaborate, detailed plans to insure a memorable vacation yet fail to devote a similar effort for student learning. Well-developed plans can also insure classroom order, hopefully insuring memorable learning experiences for our students. They deserve no less from us.

Freiborg and Driscoll (2000) define planning with these four words:

Visualizing: Planning is the ability to visualize into the future–creating, arranging, organizing, and designing events in the mind that may occur in the classroom.

Guiding: Planning for instruction provides a type of road map or guide that assists you in creating a flow of events that has a starting and ending point.

Managing: Planning is a way of managing time and events.

Decision Making: Planning for teaching is the ability to make decisions about the how and what of teaching. (pp. 21-22)

"If you fail to plan, you plan to fail" (Freiborg & Driscoll, 2000, p. 25). These authors state that planning:

1. gives an overview of instruction.
2. facilitates good management and instruction.
3. makes learning purposeful.
4. provides for sequencing and pacing.
5. ties classroom instructional events with community resources
6. reduces the impact of intrusions.
7. economizes time.
8. makes learner success more measurable, which assists in reteaching.
9. provides for a variety of instructional activities.
10. creates the opportunity for higher-level questioning.
11. assists in ordering supplies.
12. guides substitute teachers.
13. provides documentation of instruction.
14. establishes a repertoire of instructional strategies. (pp. 25-30)

Every one of these functions helps the teacher provide the optimal environment for student learning. However, it is equally important to keep in mind limitations of planning, most of which center around the rigidity and inflexibility that may emerge as the result of a teacher, often a beginning teacher, being unwilling to deviate from "the plan!" Actually, the real beauty in having a well-developed plan for instruction is that it more easily enables a teacher the occasional, important "side trip" to address/include a current event or issue.

Freiborg and Driscoll (2000) also suggest planning is not a one-step process; rather, it involves several steps. First, in preplanning, a wide variety of student and community information is gathered. Here, too, the teacher may visualize a lesson from start to finish. Second, in active planning, concrete decisions are made regarding content and teaching strategies. Ongoing planning, the third step, ensues *during* the instructional process. Here teachers make adjustments, typically based on formal and informal assessment of student learning. The final step, postplanning, is the most difficult, especially for beginning teachers. It happens *after* instruction has taken place, leaving little or no room for correction.

Ultimately, the entire planning process is always affected by three elements: the learner, the content, and the context. The learner and content determine instructional strategies as well as level of difficulty and pacing of the lesson. The context, the learning environment, also must be considered in planning for successful instruction. Context includes not only the physical aspects of the classroom, but also time of day, class size and makeup, and available technology. The classroom teacher has the ability to use all these factors in planning for instruction and consequently for student learning.

Finally, you may ask your students to complete a student information form which will give you a brief overview of "who" your students are, beyond just people in your class. Information gleaned from such a form may provide a starting point in engaging a difficult or seeming withdrawn student into conversation. It will also provide important information about what activities students are involved in outside of class, what their goals and expectations are, and what their successes and failures may be. A sample form is available at the end of this chapter.

Establishing and Sequencing Objectives

One might say the previous section on planning for instruction provides the "big picture," in other words, the goals for the year and/or semester. While that is important, ultimately the teacher must bring some logic and sequence to planning–what must be taught this semester, this month, this week, today. Freiborg and Driscoll (2000) are of the opinion that instructional objectives must meet three criteria: "describe the *outcomes* for the student, describe the *conditions for learning*, and state the degree or *level of mastery* you intent" (p. 78). Thus, objectives must also be specific, measurable, and observable. Objectives may have a variety of adjectives; however, for the moment, think about *instructional* objectives. Instructional objectives provide "a focus for instruction, guidelines for learning, targets for assessment, convey instructional intent to others, and provide for evaluation of instruction" (Gronlund, 2000, p. 5).

Much of what business education students learn requires not only cognition–thinking–but also affect—emotion—as well as physical activity such as correct keystroking techniques. So, it is important to look at how learning is categorized first and then see how these categories are related to developing objectives when planning for instruction.

Learning is typically categorized into three domains:

Cognitive or thinking

Affective or feeling

Psychomotor or physical

Benjamin Bloom is famous for his taxonomy of educational objectives. This taxonomy provides a way to classify levels of three types of learning: cognitive, affective, and psychomotor. Cognitive learning includes these levels: knowledge, comprehension, application, analysis, synthesis, and evaluation. These six levels clearly point to the need to move beyond simple acquisition of knowledge to higher levels of evaluation, involving critical thinking and problem solving. The following lists of verbs are helpful in developing objectives appropriate for various levels in the cognitive domain.

1. Knowledge
defines
lists
labels
names
memorizes

2. Comprehension
arranges
describes
recognizes
discusses
identifies

3. Application
applies
computes
demonstrates
interprets
constructs

4. Analysis
distinguishes
analyzes
contrasts
debates
solves

5. Synthesis
composes
designs
creates
invents
organizes

6. Evaluation
appraises
evaluates
judges
ranks
rates

Once a basic knowledge level has been achieved, teachers must push to develop objectives at the middle and upper levels of the taxonomy.

All too often teachers choose to develop objectives only for the cognitive domain as they are far easier to observe and measure. However, especially in business education, particular attention should be given to affective and psychomotor learning. Affective learning includes attitudes, values, and emotions. Developing strong affective qualities is important for everyone and these qualities are evidenced in many ways such as pride in neat, accurate work and/or a pleasant demeanor in the workplace. The five affective domain levels are: receiving, responding, valuing, organizing the values, and characterization by a value or value complex. The following lists of verbs are helpful in developing objectives appropriate for various levels in the affective domain:

1. Receiving
listens
observes
be conscious
remembers
be sensitive

2. Responding
responds
engages
performs
follows
answers

3. Valuing
accepts
examines
debates
enables
initiates

4. Organizing the Values
relates
weighs
defends
judges
defines

5. Characterization by a Value
revises
relies
be consistent
acts
be conscientious

The psychomotor domain includes learning requiring muscular movement. The number of levels reported for this domain vary from four to six. The first five levels frequently cited in this domain are: reflex movements, basic fundamental movements, perceptual abilities, physical abilities, and skilled movements. The following provides useful definitions in developing objectives for the psychomotor domain.

1. *Reflex movements* - involuntary; in response to stimulus, e.g, blinking, sneezing

2. *Basic fundamental movements* - innate movement patterns, e.g., walking, running

3. *Perceptual abilities* - stimuli startles senses into appropriate movements

4. *Physical abilities* - correct posture and keystroking techniques

5. *Skilled movements* - touch typing, accurately and at high rate of speed

As was indicated earlier, the term "objective" may have a number of different modifiers: enabling, process, skill, performance, behavioral, terminal. For this discussion, the term *performance objective* will be used to denote what the student is supposed to know and be able to do at the end of learning process. Performance objectives may be *enabling objectives* or *exit objectives*. Enabling objectives are those met along the way critical to success at the end of the unit of instruction. The exit objectives are those which must be met at the very end of the unit or course. The development of clear performance objectives tells students what the teacher's expectations are.

Typically objectives include three parts: "(a) an *action statement*–identifying the action that the teacher expects the student to perform; (b) a *conditions statement*–identifying the conditions under which the action occurs; and (c) a *criterion statement*–identifying the criteria or level of performance expected of the student" (Burden & Byrd, 1999, p. 66). The action statement identifies what the student must know or do, an observable and measurable action. These are some examples:

- Prepare a balance sheet.

- Produce a keyed manuscript.

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- Demonstrate appropriate work ethic/habits.
- Design a newsletter.

The conditions statements provide the circumstances under which the action will take place. Some key factors may be materials provided to students, time limits, and/or location. Here are some examples:

- Given a completed worksheet and one class period.
- Given a ten-page manuscript edited with proofreader's marks and one class period.
- Given 25 work ethic vocabulary words and one homework assignment.
- Given unarranged copy and desktop publishing software.

The criterion statements are the standards against which student performance will be evaluated or measured. Some examples are:

- A balance sheet with 100% accuracy.
- An edited manuscript with 90% accuracy.
- 85% of the work ethic vocabulary words correctly used in sentences.
- A newsletter including four of the six parts discussed in class.

As you look through these three sections, you will be able to more easily see how they fit together. As an example, develop a balance sheet, given a completed worksheet and one class period, with 100% accuracy. You can also see where the verbs in the action statements fit in the three learning domains. While clearly basic knowledge is key to student learning, you should always strive to move students along to the upper levels of learning.

Not only is it important to develop observable and measurable objectives, but they also must be ordered in a logical way, leading to attaining or reaching the exit performance objectives. *Sequencing* is the term used to refer to this process. Take the objective developed above: Develop a balance sheet, given a completed worksheet and one class period, with 100% accuracy. Several enabling objectives must be met before students will be able to meet this objective. Some of these enabling objectives are:

- Distinguish between assets, liabilities, capital, income, and expense accounts
- Know the usual balance of these accounts (debit or credit)
- Journalize transactions correctly.
- Develop and post appropriate adjusting entries.
- Develop a worksheet.

Each of these enabling objectives may also be developed with action statements, conditions statements, and criterion statements. Appropriate sequencing is key to effective student learning. If, in the previous example, students were asked to journalize transactions prior to knowing the usual balance of the five types of accounts, they would, in all likelihood, be met with frustration and failure.

The result of effective planning and establishment of objectives typically first appears in plans for a course, a unit, a day. Course planning is required to ensure adequate curriculum coverage and typically takes the form of an outline and serves as the basis for weekly planning. However, nothing takes the place of a well-developed daily lesson plan which emanates from course objectives. Daily lesson plans typically include lesson objectives, procedures, instructional materials, review/evaluation activity, and an assignment. At the end of this chapter, you will find a sample lesson plan format, a completed lesson plan, and a unit outline. As you begin your student teaching experience, you will develop a lesson plan format in concert with your on-site supervising teacher and your college/university supervisor.

Do not underestimate the value of a well-developed lesson plan. You may want to view it as an insurance policy–your protection against entering the classroom unprepared.

Selecting Appropriate Assessment Strategies

Earlier in this chapter we talked about the importance of performance objectives being observable and measurable. Why? We need to be able to determine if our students have met or "learned" the objectives. To do so, we must be able to "measure" what they know or are able to do as a result of instruction. Two words appear in literature regarding determining what students know: measurement and evaluation. Often *assessment* and *evaluation* are used interchangeably. Burden and Byrd (1999) state "*Measurement* is the process used to obtain quantifiable data that relates to specific student behavior" (p. 333). Examples might be a true-false quiz or a production test. "*Evaluation* is a process in which the teacher uses information derived from many sources to arrive at a value judgment. Evaluation may be based on measurement data, but also might be based on other types of data such as questionnaires, direct observation, written or oral performance ratings, or interviews" (Burden & Byrd, p. 333). Evaluation typically assesses two efforts: student achievement and instruction.

Three evaluation techniques are typically used with students: diagnostic evaluation, formative evaluation, and summative evaluation. Diagnostic evaluation occurs before instruction begins as its purpose is to determine or *diagnose* what the student knows regarding the learning sequence. While this assessment may be as formal as a pretest, it may also be as informal as a conversation with the class to learn what they already know about the subject matter at hand. Formative evaluation occurs throughout the learning process to monitor student progress. It provides ongoing feedback to students, teachers, and parents regarding student achievement. It also provides informal assessment of instructional effectiveness to the teacher. Summative evaluation occurs at the end of a unit, marking period, or course. Not only does it provide a basis for student grades, but it also provides evidence of student achievement–what they know and are able to do.

Two additional terms are important in student assessment: *norm-referenced* evaluation and *criterion-referenced* evaluation. "*Norm-referenced* evaluation is used to interpret a score of an individual by comparing it with those of other individuals. Ranking students is the primary issue" (Burden & Byrd, 1999, p. 333). Examples are the SAT and the ACT. Conversely, "*criterion-referenced* evaluation is used to interpret a person's performance by comparing it to some specified criterion such as a performance standard" (Burden & Byrd, 1999, p. 333). Examples here include keyboarding a letter in block format with correct block formatting the criterion or preparing a balance sheet from information contained in a worksheet provided to the student. With criterion-referenced evaluation, every student in class may earn 100% if they all got everything right! That is not likely with norm-referenced evaluation as it requires a comparison of student work with all other students' work in the class.

Planning for evaluation is as important as planning for instruction. Burden and Byrd (1999) suggest seven steps:

1. Determine reason for evaluation.
2. Determine course content to be evaluated.
3. Determine objectives.
4. Align objectives with cognitive, affective, and psychomotor domains.
5. Develop a table of specifications.
6. Determine type of test items.
7. Develop assessment instrument.

While all these steps are important, the table of specifications provides the most visible guide in planning for evaluation of student learning. The example at the end of this chapter illustrates how a table of specifications would be developed for a unit on "The Relationship of Revenue, Expenses, and Withdrawals to Owner's Equity." The number of questions to be developed appear in the boxes. You can also see evidence of the intent to develop increasingly difficult questions. This table also helps the teacher keep the questions developed in proportion with the emphasis in class on the topic (see last column).

Finally, there are three characteristics good assessment instruments should exhibit. *Validity* addresses the extent to which the instrument measures what it is supposed to measure. In other words, is an accounting word problem an accounting quiz or is it a word problem? "*Reliability* is the consistency with which a test or item measures whatever it measures" (Freiberg & Driscoll, 2000, p. 402). For example, if you administer a business law test and shortly thereafter administer an equivalent form of the same test, students scores should mirror those in the first test. *Practicality* refers to the ease of administration, time and energy required to administer the exam, and ease of scoring. All are important considerations in choosing an assessment instrument to measure student learning.

Summary

The learning theories identified and briefly discussed provide an overview of important foundational issues in effective planning for instruction. Effective instruction is grounded in a specific belief of how people learn best.

Similarly, effective instruction happens as a result of well-thought-out planning. As indicated in the discussion on objectives, planning is based on measurable, sequenced objectives. Finally, appropriate assessment strategies provided needed feedback to both student and teacher. Chapter Five provides specifics with regard to pencil-and-paper test development. Authentic assessment practices appropriate for business education are also included in Chapter Five.

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STUDENT INFORMATION FORM

Name ______________________________

Name you want to be called ____________ Your birthday ________

Your home phone ____________________ E-mail _____________

Your brothers and sisters ______________________________

Your hobbies ______________________________

Your goals after high school ______________________________

What sports or clubs do you participate in ____________________

Do you work after school? ____ If yes, where do you work? ______

Names of your parent(s) or guardian(s) ______________________

Whom would you like me to call if I need to call home? ___________

Please list your parent or guardian's job and their work phone numbers

Mother ______________________________ Phone ___________

Father ______________________________ Phone ___________

Guardian ____________________________ Phone ___________

What is your schedule of classes?	Period	Teacher
Subject ____________________	______	________________
Subject ____________________	______	________________
Subject ____________________	______	________________
Subject ____________________	______	________________
Subject ____________________	______	________________

Sample Lesson Plan

Teacher ______________________ Date ______________________

Course ______________________ Class Period(s) ______________

Lesson Topic __________________ Room ______________________

1. **Performance Objectives**

2. **Procedures** (include number of minutes for each section)
    a. Introduction/set activities
    b. Concept development
    c. Review

3. **Instructional materials**

4. **Evaluation of students**

5. **Assignment** (may be in-class or homework)

6. **Comments about lesson**

Complete Sample Lesson Plan

Ms. Katie Baughman
Accounting
Lesson topic: Accounts and the double-entry system

October 17, 2001
Periods 2 & 4
Room 234

1. Performance Objectives: At the end of this lesson, students will understand
    a. What a ledger is.
    b. What a chart of accounts is.
    c. What double-entry accounting is.
    d. How to use T- accounts.
    e. The rules of debit and credit.

2. Procedures:
    a. Introduction: A series of questions will be asked about how and why businesses and individuals keep track of their money.
        1. How do your parents or guardians pay their bills? Many people write checks; use money orders; pay by cash. Advantage of writing checks: there is a record of payment.
        2. Businesses need records of payments and receipt of cash and checks so they can prepare financial reports to know their profit or loss. They are also required to prepare tax reports for the Federal government which requires good recordkeeping.
    b. Concept development:

        Ledger: An account is the place where increases and decreases in an asset, liability, income or expense are recorded. All the accounts grouped together are referred to as a ledger.

        Chart of accounts: List of every account the business has by account classification, e.g., asset, liability, etc. All accounts are numbered, typically as follows:

            Assets begin with 1
            Liabilities begin with 2
            Owner's equity/capital begins with 3
            Revenue accounts begin with 4
            Expense accounts begin with 5

        Double-entry accounting: This is the system of accounting universally used in the U.S. where every business transaction affects at least two accounts, at least one with a plus and at least one with a minus.

        T-accounts: Useful in analyzing transactions. Literally is a T with the account name on top, debits (DR) on the left, and credits (CR) on the right.

        Rules of debit and credit: Each account classification has a **normal balance**. The normal balance side is also the increase side of the account.

Assets: Increased (+) on the left or debit side; normal balance on left; decreased (-) on the right or credit side.

Liabilities & owner's equity: Increased (+) on the right or credit side; normal balance is the right; decreased (-) on the left or debit side.

c. Review: Students will be asked the following questions for an in-class review:

What is a ledger?

What is a chart of accounts and how are accounts typically numbered?

Explain double-entry accounting.

Demonstrate how a T-account is used.

Explain the normal balances of assets, liabilities, and owner's equity and how they are increased and decreased.

3. Instructional Materials

accounting textbook

overhead transparencies or electronic slide presentation

4. Evaluation of students: Answer the "Thinking Critically" questions, the "Computing in the Business World" questions.

5. Assignment: Work problem 5.1 in your textbook. Work will begin in class; if more time is needed, the work will be completed at home.

Content Outline for a Unit in Accounting

A. Starting a Checking Account
    1. Signature card
    2. Checkbook
    3. Deposits
        a. Endorsing checks
        b. Recording deposits
    4. Writing checks
        a. Completing check
        b. Recording check
        c. Voiding check
    5. Electronic transactions
        a. Point-of-sale transactions
        b. Automatic teller machine (ATM) transactions

B. Reconciling Bank Statement
    1. Outstanding checks and deposits
    2. Bank service charges
    3. Bank interest
    4. Bank reconciliation
    5. Special procedures
        a. Stop payment
        b. NSF checks
        c. Electronic funds transfer (EFT)

Table of Specifications for Evaluation of Accounting Lesson: Relationship of Revenue, Expenses and Withdrawals to Owner's Equity

Content/Objectives	Knows		Understands	Interprets		
	Rules of DR & CR	Usual Acct Balance	Influence of DR/CR on Accounts	Transactions	No. of items	% of items
Temporary accounts	2	2	3	4	11	18.3
Permanent accounts	2	2	3	4	11	18.3
Revenue accounts	2	2	3	3	10	16.6
Expense accounts	2	2	3	3	10	16.6
Withdrawal accounts	2	2	2	2	8	13.3
Owner's capital	2	2	3	3	10	16.6
Total number	12	12	17	19	60	
Percent	20%	20%	28.3%	31.7%		100%

Chapter Four

Effective Instructional Strategies

A discussion of effective instructional strategies is incomplete without a related conversation of the actual time spent in learning. "Time on task" is a familiar phrase to business education teachers. We know that in order to acquire high levels of knowledge and skill, sufficient time is required in the learning process. McLaughlin (1988) stated, "The one relationship most clearly established by process-product research is the relationship between academic engaged time and learners' achievement gains" (p. 81).

You may be thinking, "I'll have 50, 60, or 90 minutes to spend teaching my students every period." While you will be spending 50, 60, or 90 minutes with your students every period, not all that time will be in the pursuit of knowledge. In 1980 Charles Fisher and his colleagues (as cited in McLaughlin, 1988) identified three concepts of time use important especially for beginning teachers. They are allocated time, engaged time, and academic learning time. *Allocated time* is literally how long each class period is, something that varies according to the schedule adopted by each school. *Engaged time* is that portion of allocated time when students are actively engaged in learning. *Academic learning time* adds the criteria that the learning "must be at an appropriate level of difficulty" (p. 83).

We are reminded by McLaughlin (1988) that while the classroom teacher has no control over class schedules, the classroom teacher, for all practical purposes, has complete control over how the time in each class is managed. Time in class typically is used for instructional and noninstructional activities. Noninstructional activities include taking attendance, collecting tardy and/or absence slips, collecting money for various activities, listening to school announcements, discipline, and transitioning from one activity to the next. While these are all required, they only detract and do not contribute to instructional time or time on task. You might consider making a list of noninstructional activities and instructional activities and estimating the amount of time needed to complete each activity. Next, during several days of instruction, determine the actual time spent on each activity. Then determine the percent of time estimated and spent on each activity. Is there a variance between estimated and actual time spent? Analyze the variances and determine what might need to be done to effect appropriate adjustments in time spent on noninstructional activities.

> Teachers who guide instruction through a variety of teaching strategies and who closely monitor independent seatwork will have higher-achieving students. But you must remember that common sense dictates that quality of instruction plays an important role in helping students achieve. More time is not the only criterion for success, especially if it is more *bad* time (McLaughlin, p. 88).

This introduction to academic learning time is an important foundation to determining effective instructional practice. Not only is the time allocated to learning important, equally important is the selection of the best instructional strategy for both the learner and the content.

Selecting Instructional Strategies: Lecture to Discovery to Contextual Teaching & Learning

So how **does** one choose an instructional strategy? Often we teach as we prefer to learn (Stitt-Gohdes, 2001; Stitt-Gohdes, Crews & McCannon, 1999). However, that usually means some students' learning needs will not be met. Two factors guide the choice of instructional strategy: the learner and the content. Given these two factors, it is also important to understand that because of student differences, varying strategies may be required to teach the same topic. The following figures illustrates how strategies move along a continuum from teacher-centered or a command approach to a learner-centered, discovery, or contextualized learning approach.

Figure 4.1
A Continuum of Instructional Strategies

Teacher Centered, Command Approach

1. Lecture (Without visuals, With visuals)
2. Demonstration
3. Questioning
4. Discussion (Whole group, Small group)
5. Cooperative learning
6. Guided practice/discovery
7. Inquiry
8. Simulation/role play
9. Contextual teaching-learning

Learner Centered, Discovery Approach

This continuum is reflective of those developed by Schrag and Poland (1987) and Freiberg and Driscoll (2000).

Lecture/Direct Instruction

The lecture strategy is a teacher-centered approach. The term "lecture" has a negative connotation because the image many hold is that it is boring, does not engage students, and does not provide opportunities to check student comprehension. However, lectures are used quite effectively to introduce new topics, share information, explain challenging ideas, and stimulate student interest. The teacher who prepares a lecture with visual aids, who considers the attention span of students, and who incorporates other strategies such as questioning will be effective. The following guidelines may be useful in developing an effective lecture:

1. Be organized. Know your objective and share it with your students.

2. Limit the topics covered to about three. List them, both orally and visually.

3. Before moving to the next topic, check for student understanding.

4. Keep the lecture brief, under 20 minutes. Few students will pay attention longer than that.

5. Examples and other visual aids enhance the quality and effectiveness of the lecture.

6. Summarize main points before moving to next topic.

The lecture method has been used as a teaching tool literally for thousands of years. It probably has been abused as an instructional strategy for as many years. When used appropriately, it can be very effective.

Demonstration

Demonstrations represent the intersection of theory and practice. This method provides an opportunity to demonstrate correct applications, processes, and/or procedures. Also, demonstrations can move information in a lecture from abstract to concrete. Demonstrations are appealing to the visual and/or tactile learner who learns best in hands-on activities. The goal for the students is to imitate the teacher; and for this, a high level of skill must be demonstrated first. In fact, the teacher may have to stand when normally the user would be seated when using the skill. Clear, step-by-step explanations must accompany the demonstration so nothing is left to one's imagination. Typically a procedure might be demonstrated twice. The first time would involve step-by-step instructions as the teacher moved through each step of the demonstration. Clearly, this would result in choppy movement and in all likelihood, not a good representation of how the skill, process, or procedure should actually proceed. A second demonstration of the skill alone will show the learner smooth, almost automatic, movement through the skill.

Several points are important in using the demonstration as an instructional strategy.

1. Use the actual equipment, software, or technology the student will ultimately be responsible for learning.

2. Demonstrate the entire procedure before demonstrating it in front of your class or a group of students. Make sure you have all the materials you need and that everything works the way it is supposed to work.

3. Make sure your students are ready to learn through an anticipatory set where their interest has been piqued.

4. Arrange your students and the equipment so everyone can see. If possible, position the equipment so the demonstration can be viewed from the direction in which the students will perform it. If necessary, divide the class into smaller groups and do multiple demonstrations.

5. Show and tell at the same time, making sure appropriate terminology is used.

6. Throughout the demonstration, watch students for signs of confusion or doubt.

The demonstration is one way of meeting preferred learning styles of some students. In business education, it is an important part of early skill acquisition.

Questioning

Effective questioning is a valuable strategy throughout the learning process. Contrary to popular opinion, it is not appropriate just for review at the end of the class period. Mackey and Appleman (1988) suggest these four objectives for questioning:

1. Provide motivation for the students by gaining their interest and attention.

2. Promote the thinking and mental activity of the students.

3. Involve more students in the process of instruction.

4. Obtain feedback on the students' progress. (p. 147).

Bott (1998) suggests using questions serves several purposes.

1. Questions can be used to get and maintain interest. A carefully crafted question may be sufficiently thought provoking to arouse and maintain student attention and curiosity.

2. Questions may stimulate students to think for themselves. Along with the freedom to think for themselves comes the ability to be comfortable in answering questions–whether their answers are right or wrong.

3. Questions can be used to evaluate what has just been taught. A few well-crafted questions are an excellent test of whether or not students understand the lesson.

4. Questions permit distribution of opportunity for class participation. Questions directed toward specific students will preclude a few students from dominating class conversations.

5. Questioning may also help determine student attitudes. Negative attitudes or feelings about lesson topics may emerge through questioning. This provides an excellent opportunity to query and challenge conflicting opinions. Likewise, evident enthusiasm enhances the learning experience for all.

6. Probing questions can help develop the subject being studied. Questions creating cognitive dissonance can help challenge students to think critically and problem solve.

Burden and Byrd (1999) suggest three steps to framing a question: "(a) ask the question, (b) pause (use wait time), and (c) call on a student" (p. 93). The use of wait time, typically three to ten seconds between when the question is asked and when a student is called on, brings many advantages, not the least of which is less teacher talk and less repetition of student answers.

Burden and Byrd (1999) also suggest that different types of questions are appropriate for different situations. Students' attention can be directed to the topic at hand with *focusing questions*. Focusing questions allow the teacher to check for student learning and understanding as well as to stimulate student interest. *Prompting questions* may give the student hints in answering the question or correcting an initial response. When a student has not answered a question completely, *probing questions* are extremely useful. They may provide needed clarification for the student.

Perhaps the following from Bott (1998) is the best advice: "The ultimate purpose for asking questions is to further the students' learning. Questions that are designed to trick students or that have nothing to do with reaching the lesson objectives have no place in good instruction" (p. 121).

Discussion

People discuss topics of interest and importance every day. Rarely do discussions follow a direct line from start to finish; typically, they are curvilinear in form. Discussions may begin as a result of a question or statement and progress from there; rarely, however, does a discussion begin, progress, and conclude by addressing one topic alone. Frequently, classroom discussions take on much this same curvilinear appearance. The important difference, though, between casual and classroom discussion is the classroom discussion is driven by an objective for the day's lesson. Freiberg and Driscoll (2000) define discussion as "the interchange of ideas between students and their teacher or among students. It may take place in whole-class settings, within groups of students, or between two students. Discussion requires a climate of reflective listening, respect for the speaker's ideas, and noninterference from the teacher" (p. 229).

This method provides a unique opportunity for students to be active participants in the learning process through conversation and discussion. Obviously, this strategy is best suited for a learning situation with objectives calling for cognitive or affective development rather than manipulative development. And, contrary to what you might be thinking, leading a class discussion is hard work, requiring careful planning for successful implementation. Burden and Byrd (1999) suggest these eight guidelines:

1. Consider the goals of the discussion.
2. Consider the experience and development of the students.
3. Study the issues.
4. Orient the students to the objective of the discussion.
5. Provide a supportive classroom environment.
6. Provide new or more accurate information when it may be necessary.
7. Review, summarize, or weave opinions and facts into a meaningful relationship.
8. Use humor. (pp. 97-98).

For discussions to be successful, a climate of trust must exist in the classroom. The goals for the discussion must be apparent to teacher and students. Teachers must actively listen. Active listening may require paraphrasing back student comments which is a very literal way of letting students know the teacher really is listening. Be sure the objectives and subsequent discussion are based on information students already know; otherwise the discussion will be less than effective. Students need to know they may contribute their own ideas and that the teacher does not have to be a part of the dialogue. Discussions, especially in small-group settings, provide opportunities for shy students to learn to feel comfortable expressing their opinions and participating in class. Discussions are also an excellent mechanism for students to learn respect for others' viewpoints and to avoid dominating the conversation.

However, for the student-to-student exchange to be most meaningful, all students must understand no one has the right to denigrate a statement another student has made with a comment like, "That's the dumbest thing I ever heard" or, "That's wrong," without offering a reason why they believe it is wrong.

As with any instructional strategy, preparation is critical. When a teacher has not prepared sufficiently, two things can happen. First, because many students are participating, it is hard to keep the discussion on track. Second, if the teacher has not asked the right questions, student participation can evaporate and the discussion will fail or take too long. Students also have responsibilities.They must actively listen to their classmates, and they must be prepared for the discussion.

Dillon (as cited in Freiberg & Driscoll, 2000) "suggested two approaches to discussion: (1) pose a single question for discussion, and (2) pose a question for which there is no ready answer" (p. 231). Bott (1998) suggested starting with an easy question. Once one or two questions have been answered successfully, more thought-provoking questions can be asked. These may require probes of *how* or *why*. When it appears the discussion has reached a natural conclusion or allocated time has expired, summarize the material before moving on to the next question for discussion or lesson topic.

One final note: when we engage in everyday conversation, we typically are able to be face-to-face with the person with whom we are speaking. As most classrooms have students in rows, it might facilitate the discussion if the desks or chairs are moved into a circle or semicircle. That seating arrangement will enhance the conversation.

Cooperative Learning

"Cooperative learning refers to a set of instructional techniques whereby students work in small, mixed-ability learning groups" (Wong & Wong, 1998, p. 245). Thus, cooperative learning requires that students, often of differing ability levels, work together in sufficiently small groups so everyone may participate. Once the problem or task has been assigned, the group works relatively independently of the teacher. Freiberg and Driscoll (2000) suggest two guidelines. First, the class must be prepared for cooperative learning. The purpose and process must be clearly spelled out for students. Second, decisions must be made regarding group size and membership. In the early stages of cooperative learning endeavors, small groups of about four students seem to work best. Teacher-selected groups work more efficiently and stay on task better than student-selected groups. With regard to membership, the group may be heterogeneous or mixed ability. Clearly there are advantages and disadvantages to each. The purpose of the cooperative learning activity may drive the decision regarding membership. Wong and Wong suggest "Effective grouping is dependent on two major factors: 1. The class climate. 2. The explanation" (p. 247). Class climate is affected by an effective teacher who expresses positive expectations, who is efficient, and who maximizes academic learning time. The explanation is affected by how effectively the teacher explains the how and why of the group process.

Johnson and Johnson (as cited in Burden & Byrd, 1999) state that each cooperative learning lesson should include these elements:

> (a) Positive interdependence—students must feel they are responsible for their own learning and that of the other members of the group; (b) face-to-face interaction–students must have the opportunity to explain what they are learning to each other; (c) individual accountability–each student must be held accountable for mastery of the assigned work; (d) social skills–each student must communicate effectively, maintain respect among group members, and work together to resolve conflicts; and (e) group processing–groups must be assessed to see how well they are working together and how they can improve (p. 100).

One key aspect to cooperative learning is students learn teamwork firsthand as they are responsible not only for their own learning but also that of their teammates.

Guided Practice and Guided Discovery

Guided practice is exactly as it sounds. Teachers guide students through the first practice of a skill and provide the needed reinforcement, correction, and support until the student has acquired the skill. There is a relationship between the frequency of guided practice and student success. Persistent reinforcement is key to a skill or knowledge, progressing from short-term to long-term memory. An example of guided practice in a word processing class would be where the teacher would take the class through each step of the mail-merge process before the students attempted it on their own.

Guided discovery provides a framework for problem solving. With guided discovery, students are given a problem or situation that will provoke questions. With the teacher as the guide, students work through the problem to an acceptable solution. One may say the students move from dissonance to discovery, as initially the teacher may create cognitive dissonance, or pose a situation that conflicts cognitively with students' prior experiences or beliefs. For example, the teacher may say, "No one should be able to have a credit card until he or she has graduated from high school or college and is working full time." A statement like this will, in all likelihood, conflict cognitively with many students' experiences and beliefs.

The students must clearly define the problem and learn the value of carefully constructed questions to the teacher which may provide clues to the solution. Students may be guided, if necessary, to sources useful in this aspect of the endeavor. Based on the data gathered, students develop several plausible solutions with justification for each. Each solution is tested to determine the best or most appropriate, given the scenario. As with the discussion strategy, a climate of trust and honesty in the classroom is key to the success of guided practice and/or discovery.

Inquiry

Inquiry progresses naturally from guided discovery as it requires the student to think critically and independently of the teacher in order to solve the problem provided by the teacher. Freiberg and Driscoll (2000) provide these six steps that may be used in using the inquiry strategy:

1. Forming and refining a question they wish to answer.
2. Collecting instances and observing facts likely to be related to a possible answer.
3. Putting facts or instances into a class or classes, and making generalizations about them.
4. Making intelligent guesses (hypotheses) based on the facts to suggest possible explanations.
5. Testing to see which hypothesis, if any, is the correct one.
6. Using the new information as a basis for further reasoning (p. 322).

For example, in a basic business class, students may be asked to develop a service business and then develop a business plan to be used in obtaining financial support for the business.

As with instructional strategies discussed previously, students must be prepared for the inquiry approach to be successful. This strategy is also an approach that would require a number of class meetings from start to finish. Ample time for students to work through all six steps is key to optimum utilization of the method.

Simulation/Role Play

These instructional strategies have been a part of business education for many years. Many of us applied the accounting and office procedures knowledge we acquired in accounting and office practice simulations. Typically they were used in schools or locations that did not offer any work-based learning programs. Simulation and role play may be referred to as *experiential learning*.

Simulations. Simulations provide school-based learning situations that closely approximate those of the workplace. An accounting simulation, for example, would require the student to work through the entire accounting cycle, from writing checks, depositing money, purchasing office supplies as well as materials for production, journalizing all transactions, preparing adjusting and closing entries, to preparing balance sheets and income statements. All the "documents" closely resemble those used in the workplace. While some schools may still use paper accounting simulations, many others may use electronic versions. The value is the student is able to see a clear path from one step in the accounting cycle to the next as well as the impact of one transaction on two or more accounts.

Clearly, simulations in business education are most often used as capstone experiences, as the student must have a solid knowledge base of the materials needed to maneuver the simulation. In order to check student progress through the simulation, a teacher may give a "findings" test where the student might be called on to find the checkbook balance as of a particular date or the balance in the accounts receivable account, or the amount for check no. XX. A findings test provides two assessment opportunities: (1) the teacher is able to determine the student's knowledge of the accounting cycle, and (2) the teacher is able to determine if the student is making appropriate progress through the simulation.

Role playing. Role playing is an excellent way of incorporating affective learning into instruction. It is an instructional strategy where students take on roles and act out situations. As with any instructional strategy, planning is important. Students must have a clear idea of the objective of the activity and the serious nature of the assignment. Role playing provides a unique opportunity for students to practice how they might react or respond in a real-life situation later. Typically, student responses are impromptu. A frequent use of role playing in business education is a mock trial in a business law class or a mock interview in a job readiness or business communication class.

Contextual Teaching and Learning

While the term *contextual teaching and learning* (CTL) is, for some, a relatively new term, the concept is one which has been incorporated into business education and career and technical education since its inception. CTL is a concept and practice that connects the content students are learning with the context in which the knowledge will be used. So, if I want my students to learn how to manage and balance a checkbook, they must write checks, make deposits, use automatic teller machines, and reconcile a bank statement. If my desktop publishing class has acquired the skill to develop a newsletter, contextualizing the assignment would require the students to actually develop a newsletter and distribute it.

> Characteristics of CTL include teaching and learning that is problem-based; fosters self-regulated learning; occurs in multiple settings or contexts; anchors teaching and learning in students' diverse life contexts; uses teams or interdependent group structures so students can learn from each other; views learning as situated, social, and distributed; and employs multiple methods for assessing student achievement (Sears & Hersh, 1999, p. 5).

Contextual teaching and learning typically includes strategies such as inquiry-based learning where students must solve problems and construct needed knowledge as they go along. CTL may include service learning that combines community service with a school-based opportunity for reflection about that activity. But most often, CTL is best demonstrated in the workplace where students construct needed knowledge based on their prior learning which they need to solve structured and unstructured problems.

Clearly, CTL is learner centered and is a discovery approach. It may provide an excellent strategy or situation for students to clearly connect in-school learning with out-of-school needs.

Evaluation and Selection of Instructional Resources

Instruction can be enhanced or diminished by the choice of instructional resources. Well chosen instructional resources can be one way of adapting to students' preferred learning styles. Because of the national focus on school reform, a proliferation of materials for classroom instruction has developed. A careful evaluation of resources available is key to making the best choice.

Classroom teachers in public schools are provided lists of state-approved textbooks and other resources, and selections must be made from those lists. Making the best choice still requires a degree of evaluation. Burden and Byrd (1999) suggest the use of high quality instructional resources can make instruction more interesting, can improve the quality of instruction, can enhance the positive attitude of learners, and may reduce the length of time needed for instruction.

Heinich, Molenda, Russell, and Smaldino (as cited in Burden & Byrd, 1999) suggest the use of the ASSURE model when planning for effective use of instructional media. "***ASSURE***" is an acronym for (a) ***a***nalyze learners, (b) ***s***tate objectives, (c) ***s***elect media and materials, (d) ***u***tilize materials, (e) ***r***equire learner performance, and (f) ***e***valuate/revise" (p. 139). This model may be used for selecting everything from printed materials to electronic materials and equipment.

Burden and Byrd (1999) provide these nine principles that may serve as the basis for selecting and using any instructional material:

1. Instructional media should follow, not dictate learning objectives.

2. Instructors must be thoroughly familiar with the content of all media used in instruction.

3. The instructional media must be appropriate to the teaching formats being used.

4. Instructors should select only instructional media that are consistent with student capabilities and learning styles.

5. Instructional media should be chosen objectively rather than on the basis of the teacher's personal preference or bias.

6. Instructional media should be chosen on the basis of their contribution to the learning outcomes rather than on the basis of availability or ease of use.

7. The physical conditions surrounding the utilization of instructional media should be arranged to enhance the results.

8. Instructional materials produced locally by instructors often make significant contributions to learning.

9. No one medium is best for all purposes. (p. 141).

Just as choosing instructional strategies is determined by the learner and content, learner and content are key factors in choosing the most appropriate instructional resources.

Printed Materials

The most frequently used printed materials are textbooks. As stated earlier, state departments of education develop lists of state-approved textbooks for every subject area. In the year of adoption–new textbooks are not purchased every year–copies of texts on the lists are made available for public review. Public review provides an excellent opportunity to preview the actual book you may decide later to use. Textbook publishers also exhibit their offerings at professional conferences at the state, regional, and national levels. These exhibits provide an excellent opportunity to examine first-hand texts and accompanying resources to be considered for later adoption. Free examination copies for review are also available through textbook publishers.

An evaluation form can be a useful tool in evaluating printed resources. It provides structure and uniformity to the process. Broad categories to consider are: (1) physical features of the text/material where issues such as the binding and size and paper and print quality are important; (2) organization of material which examines sequencing of topics, accuracy of content, appealing nature of presentation, table of contents, and examples; (3) content which includes appropriate language and level, timeliness of content, writing style and vocabulary; (4) and the author's background. A rating scale could be developed for each of these aspects and would be used for evaluating every textbook. This procedure provides a uniform basis for comparison.

You should also be aware that typically the number of years between textbook adoption is between five and seven. In business education and other technology-related areas, some states reduce that adoption cycle to two years. This practice better insures more current textbooks and related materials for classroom use.

Electronic Materials

Before any electronic materials–hardware or software or anything else–is acquired, a fundamental question must be asked, "What are the anticipated outcomes of the program?" The answer to this question really drives the rest of the decision-making process. Gueldenzoph and Hyslop (1995) suggest these four areas must be addressed: "cost considerations . . . . standardization within institutions . . . . use of appropriate technology . . . . and use of an evaluation plan" (p. 96). Gueldenzoph and Hyslop also advocate considering these factors in analyzing benefits of electronic materials:

- compatability of technology with existing technology
- degree to which technology meets the needs of teachers
- ease of student learning (user friendliness)
- ease of integration with other elements of the learning process
- documentation (how-to manuals) that permits ease of use
- relationship to achievement of student goals
- efficient and effective use of class time
- ease of allowing for teacher's assessment of student performance (p. 98).

The evaluation and selection of software programs can be relatively simple or very complex. A needs analysis can be useful in pinpointing the best software for classroom instruction. This will include software determined to be the industry standard as well as those programs most frequently used in business in which students may later seek employment. However, any selection of software application programs is clearly influenced by the capability of the computers on which they will run. Questions such as these may be asked: Is it easy to use? Is there documentation? Is there readily available vendor support? Can it be upgraded? Are there textbooks in print that work with the software?

Once clear instructional goals are established, the selection of electronic materials is easier. However, because of the fact that so much material is available, careful scrutiny and selection is important.

Equipment and Facilities

In any conversation about equipment in business education, this question is often asked, "Should I choose hardware first or software first?" Gueldenzoph and Hyslop (1995) provide the best answer, "When evaluating technology for classroom applications, the most important factor is selecting technology that meets the instructional needs of the classroom right now and in the next few years" (p. 99). Probably the two biggest decisions to make are regarding choosing an IBM vs. a Macintosh platform and a local area network vs. standalone configurations. There are advantages and disadvantages to each, not only with regard to instruction but also with regard to initial cash outlay. The ability to be upgraded is a key factor to consider in the hardware evaluation process.

Computer stations in business education classrooms today frequently house CD-ROMs. This feature can dramatically extend knowledge available to students without using the Internet. Teachers may also consider having one computer which will actually record on CD-ROMs so students will be able to have this experience. Computers in classrooms often have a fax/modem capability. The modem allows the world of learning to move far beyond the four walls of the classroom via the Internet.

Classrooms may have laser, ink jet, and impact printers. Obviously, timed writings need not be printed on a laser printer on expensive paper when an impact printer and recycled paper will do. However, having a laser-printed final copy of a document will impress upon the student more than words the value of a good printer and high quality paper on a final document.

While cost is always an issue, it is less of an obstacle for many schools today because of the steady decline in the cost of computer hardware. The caution to remember is you do get what you pay for. So if an offer from a vendor seems unreasonably low, be meticulous in evaluating the proposal.

Computer technology has dramatically affected classroom layouts for business education classes. The layout and design of the classroom does impact instruction. Also, whether or not the computers are networked may have an effect on the layout. Clustered work stations really enhance the use of a local area network (LAN). Clustering also makes it easier for computer cables to be kept out of walkways. Typically six work stations would be clustered together with one printer to serve all computers. The negative aspect of clustering is it is impossible for the teacher to see all computer screens at once. An alternative layout is more reflective of a traditional classroom where desks are in rows where two computers are placed on either side of a printer. Clearly this set up would require more printers than a clustered layout.

Bayless (1995) suggests, "All computer classrooms should include a complete teaching station that is on a moveable cart. . . . The portable station should consist of a computer, an LCD panel, and a high density overhead projector or any other equipment that allows projection of images from a computer" (p. 112).

Miscellaneous Technology Resources

In addition to the equipment previously discussed, there are additional resources to consider, including scanners, digital cameras, and color printers. These resources would be very useful tools in a desktop publishing class that was developing a newsletter. These types of technology would enable students to scan photographs and other print media and incorporate them into their documents. The department may also choose to acquire a digital camera. This camera, too, could be used to take pictures at special events which could then be incorporated into the school newsletter.

One of the biggest considerations for many business education teachers is whether or not to use the Internet in instruction. Today schools and departments often have guidelines developed for Internet use which students, and sometimes their parents/guardians, must sign. The use of the Internet, while providing a marvelous opportunity to explore the world, also provides a unique opportunity to teach responsible use of technology and the Internet.

Resources available via the Internet may be incorporated into every business education class. For example, international monetary exchange rates may be used in a consumer economics class; search engines may be used to gather research for report preparation in desktop publishing or word processing. The possibilities are restricted only by the teacher's creativity.

Evaluation of instructional resources is just as important in the instructional process as is evaluation of student work and progress. It requires careful planning and follow-up evaluation. It is also best done by a team, taking advantage of the collective wisdom and experiences of a number of business educators.

Integrating Instruction

Little today happens in a vacuum–nor should our instruction. One part of school reform is integrated curriculum and, thus, instruction. Freiberg and Driscoll (2000) state, "Integrated curriculum is the blending of several or all content areas around a theme, a problem, or a project. Integrated teaching and learning responds to the expanding curricular knowledge base as well as the need for relevant curriculum for an increasingly diverse group of learners" (pp. 13-14). When business education students enter the workforce, their work will require interaction with employees throughout the organization. Experience in school in working with learners and topics across or through the curriculum will make students more successful in continuing education and later employment.

Summary

As evidenced by the discussion in this chapter, a wide variety of instructional strategies are available. The two key factors, however, is selecting the appropriate instructional strategy are the student and the content. So, while one strategy may work with one class, it may not work with another section of the same course. A keen understanding of your students' learning preferences and prior knowledge are extremely useful in selecting appropriate instructional strategies. In addition to strategy selection and evaluation, careful evaluation of printed materials, electronic materials, and equipment and facilities is an important component in effective instruction. Effective instruction is not a standalone effort. Effective instruction results from careful planning and evaluation of every component of instruction from establishing objectives to evaluating materials.

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Chapter Five

Assessment Strategies

As you read the title of this chapter, you may be wondering, "If this is about assessment, where do you talk about evaluation?" Perhaps you have heard these terms used interchangeably; they are, in fact, different and both are important in determining whether or not our students have learned anything.

Freiberg and Driscoll (2000) state, "*Evaluation* . . . is, the process of making a decision about student learning. Evaluation requires us to make a judgment about student knowledge, student behavior or performance, or student attitude. *Assessment* is a strategy for measuring that knowledge, behavior or performance, or attitude" (pp. 398-399). Wiggins (1998) supports the premise that assessment should be educational in two fundamental ways,

> First, assessment should be deliberately designed to teach (not just measure) by revealing to students what worthy adult work looks like (offering them authentic tasks). Second, assessment should provide rich and useful feedback to all students and to their teachers, and it should indeed be designed to assess the use of feedback by both students and teachers (p. 12).

Clearly this approach resembles an ongoing conversation, give and take, with the focus on student learning. The teacher models appropriate performance; the student attempts to replicate it.

Wiggins (1998) likens the role of a teacher to that of a coach, "Think of being coached in chess or basketball, or recall efforts at losing weight: the 'teaching' is meaningless unless we learn to internalize methods, insights, and standards through the feedback from the results of our attempted performances and through the coach's targeted guidance" (p. 13). Learning something new, whether on a playing field or in a classroom, happens over time, with education, guidance, and improved performance. Further, Wiggins is adamant about what students need to know about the assessment process as they move through the schooling process. Specifically, he states students need these four things:

1. They need a complete demystification of the standards and performance tests against which they will be evaluated (as already occurs when people work at a job, play music, or participate in sports).

2. They need multiple opportunities with accompanying feedback to learn to master complex tasks.

3. They need progress reports in which current performance is judged against exemplary adult performance.

4. Most of all, they need to know how they are doing as they do it (p. 14).

Evaluation and assessment, especially for the beginning teacher, can be serious challenges. Not only must students learn, but teachers also, vis-a-vis test results, are accountable to school administrators, parents, and community businesses. Carmichael and Caldwell (1988) suggest teachers frame instruction and evaluation around these three evaluation questions:

1. To what degree are my classroom objectives consistent with the school goals and purposes?

2. To what degree are classroom activities consistent with classroom objectives? Or, can I expect that these classroom activities will promote the achievement of these objectives?

3. To what degree are assessment activities consistent with the classroom objectives? (p.267).

Comprehensive Assessment

An understanding of comprehensive assessment is important before one can choose, design, and implement specific assessment practices. First, let's look at the purposes of assessment: diagnostic assessment, formative assessment, and summative assessment.

Diagnostic Assessment

Diagnostic assessment enables the teacher to diagnose student needs. The optimum situation is to use diagnostic assessment prior to instruction as it provides the teacher helpful information to use in planning. Diagnostic measures may be formal such as standardized tests, placement tests, or questionnaires. They may be as informal as observations or conversations with students.

Formative Assessment

Formative assessment is used throughout instruction to assess students' learning as they move through a unit of instruction. Formative measures may include quizzes, performance tests, observations, or in-class or homework assignments. While formative assessment measures let the teacher know if students are learning, they also provide data useful in revising instructional plans.

Summative Assessment

Summative assessment is used at the end of a lesson, unit, or course. A final exam, while perhaps not the best measure, is a frequently used form of summative assessment. Other examples include performance tests, projects, or portfolios.

Regardless of which form of assessment you are using, the focus should always be on promoting and improving student learning. Given these three types of assessment, let's now look to how assessment data are used everyday in the classroom, beyond measuring student learning: for planning, for decision making, to promote learning, and for communication.

Planning. Diagnostic assessment data are especially important and useful in planning for classroom instruction, in selecting resources and materials, and in determining what your students already know about a particular topic.

Decision making. While one would never make a life-changing decision regarding the education of students based on only one assessment measure, assessment data do provide information useful in making decisions about a number of factors affecting student learning. These data help in the grouping and placement decision as well as identification of special needs. Assessment data are used to determine grades as the basis for promotion, retention, graduation or certification. They also are helpful with vocational counseling (Freiborg & Driscoll, 2000).

Promote Learning

Assessment information may be used to prompt thinking or review. An invaluable use of assessment data is to motivate students based on the feedback generated. For this feedback to be meaningful, it must be clear and specific to the piece of work at hand.

Communication

Results from student performance can easily serve as the basis for a conversation with parents, other school personnel, and the general public. Unfortunately, most of what we hear reported is the result of national, standardized test scores rather than the fruits of a student's labor on an important project that may be grounded in workplace skills.

Increasingly, teachers are being called upon to better contextualize classroom learning and, thus, assessment. Contextualizing learning means grounding instructional and assessment activities in real world contexts rather than abstract, purely theoretical situations. Not only does contextualized learning provide students the opportunity to learn and apply that learning in more real-world-like situations, but it also increases the probability those learning and assessment experiences will be better connected or associated with the lives and experiences students live everyday.

Authentic is a term increasingly used to describe assessment. Wiggins (1998) provided this definition,

> Authentic assessment is simply a fancy way of describing what performers in the world beyond school face each day: they are tested on their ability to do a known job well and in a variety of circumstances in which the performer has a right to receive or seek utter clarity about purposes, audience, standards, and criteria . . . there is invariably nothing unknown about the purpose of the challenges they face . . . . Why should school testing be any different? (p. 42).

Wiggins also stated, "Assessment must be anchored in and focused on authentic tasks because they supply valid direction, intellectual coherence, and motivation for the day-in and day-out work of knowledge and skill development" (p. 21). Traditional test questions, whether on a teacher made, pencil-and-paper test or from a standardized test, are "*indirect* ways of testing performance *directly*" (Wiggins, 1998, p. 22). While these tests have some role in the entire assessment process, they are typically not tests of mastery. Wiggins suggests the following criteria to determine if an assessment task or problem is authentic:

1. Is it realistic? Does it replicate how similar knowledge would be tested in the real world?

2. Does it require judgment and innovation? Must the student apply and use the knowledge to solve unstructured and ill-defined problems?

3. Does it ask the student to "do" the subject?

4. Does it replicate or simulate the *contexts* in which adults are "tested" in the workplace, in civic life, and in personal life? Is the required task contextualized?

5. Does it assess the student's ability to efficiently and effectively use a repertoire of knowledge and skill to negotiate a complex task?

6. Does it allow appropriate opportunities to rehearse, practice, consult resources, and get feedback on and refine performances and products? (pp. 23-24).

Where Do I Find Assessment Instruments?

Once you have decided on the type of assessment needed, the next step is choosing or developing an assessment instrument. You may draw on a variety of resources. Your fellow business education teachers may have instruments they would share with you. The teacher's manual accompanying the textbooks you use will have not only a test bank but also a variety of activities used to measure student learning. You may also seek out assessment strategies/instruments developed by national skill boards and professional associations.

However, regardless of the source of your assessment strategy, once selected, you should carefully appraise the strategy. Ebel (as cited in Freiborg & Driscoll, 2000), suggests a good test exhibits these ten qualities:

1. *Relevance*. Do the items of this test match the objectives and content information of my teaching? Does this test measure the learning that I intended for my students?

2. *Balance*. Does this test represent all of the important content that I taught? Is important information given importance in test items? Is any information given too much representation in the test items?

3. *Efficiency*. How much time will this test take? Is that amount of time appropriate or in proportion to the amount of time I spent teaching the content?

4. *Objectivity*. When I look at answers to the test items, are they fair?

5. *Specificity*. Is there a match between the curriculum information and the test items? Could a student who missed class do well on this test?

6. *Difficulty*. Can at least half of my students do very well on this test? Could each item be answered correctly by at least half of my students?

7. *Discrimination*. Will my students who worked hard, studied well, and are knowledgeable answer most of these items correctly? Will my students who put little effort, did minimal studying, and aren't knowledgeable answer most of these items incorrectly?

8. *Reliability*. Would my students score similarly if they took this test two days in a row? Does it matter who gives this test?

9. *Fairness*. Will all students have an equal chance on this test? Does it favor a particular group?

10. *Speed*. Will my slow-working students be penalized on this test? Will there be any problem with some students finishing this test? (p. 409).

A useful tool to better insure you are addressing some of these questions is the Table of Specifications discussed in Chapter 3. It is especially useful in meeting the balance test to make sure test questions fairly and proportionately match foci of instruction.

In addition to the foregoing ten qualities to look for in assessment instruments, four additional characteristics are important considerations: validity, reliability, criterion-referenced, and norm-referenced. While volumes are available on each of these topics, the following provides a brief explanation of each of these characteristics.

Validity

"A test is valid if it measures what the authors and users intend it to measure" (Lambrecht, 2000, p. 29). For example, if in a business math class, a word problem is developed using technical language not included in instruction and which the student is unable to understand even with extrapolation, the problem ceases to be a business math problem, but has become an English problem. The test does not measure what it was intended to measure: business math knowledge.

Reliability

"A test is reliable if it measures consistently what it is designed to measure. Reliability also means that the test yields a consistent score when administered on two different occasions, or when administered by different test administrators" (Lambrecht, 2000, p. 31). For example, a teacher develops a test on classifying accounts and journalizing entries for an accounting test and administers the same test to four different sections of accounting students. If the scores from the four different sections of accounting students are consistent, the test is said to be reliable.

Criterion-Referenced Test

A test is said to be criterion referenced when the student's score or performance is evaluated against a specific, predetermined performance standard. The performance standard may be based on national skill standards or on local entry-level employment standards. The key, however, is that student performance is evaluated against a standard, not against another student's performance.

Norm-Referenced Test

"When a student's performance on a test is evaluated in relation to a particular norm group, such as the class of which the student is a part, the student's work can be described in relation to the class average or other statistical measures of relative class standing" (Lambrecht, 2000, p. 32). Norm-referenced testing is more typically used with system-wide or state-wide assessment measures. When choosing to use a norm-referenced test, selecting a measure that has been normed on a group of students similar to the group with which you plan to use the test is critical; otherwise, the effort is wasted.

The first part of this chapter provides an overview of issues relevant to assessment in general. The next section provides specifics with regard to design and implementation of a variety of assessment strategies appropriate for business education.

Design and Implementation

Now the time has come to learn about the design and implementation of assessment measures. The following five steps provide a framework for designing and using appropriate assessment measures:

1. Establish objectives to be measured

2. Determine appropriate test items

3. Construct test items

4. Assemble test

5. Grade test

Establish Objectives to be Measured

The objectives for the unit or course you are assessing serve as the foundation for the remainder of the decisions you will make. The content to be measured and your students' abilities will determine the most appropriate type of assessment measure to use. Using a Table of Specifications (see Chapter 3) at this step can be extraordinarily useful. Not only will it have your objectives for the unit or course clearly stated, it will also help you assure proportionality of test questions with regard to content coverage. In other words, if, in a business communication course, you spent 25% of your time on sampling techniques in a unit on report research, 25% of your test questions/measures should address sampling techniques.

Determine Appropriate Test Items

The content to be evaluated and the student learner will determine the appropriate test item to use. Gronlund and Linn (1990) state, "Select the item type that provides the most direct measure of the performance task described in the intended learning outcome. If, for example, the task is one of *writing, naming,* or *listing,* the item should require the pupils to supply the answer. If the task calls for *identifying* a correct answer, a selection-type item should be used" (p. 125). If, for example, in a word processing class, you want to know if your students know how to perform the mail-merge function, the most appropriate test would be a performance test, not a true-false or multiple-choice test.

Test items are traditionally divided into two categories: objective items which are very structured and require the student to either choose or supply the correct answer or essay items which may ask for a restricted or extended response and which require the student to "select, organize, and present the answer in essay form" (Gronlund & Linn, 1990, p. 121). As we move to the next section on constructing test items, keep in mind the purpose of classroom testing is to discriminate between those students who **know** the answer and those who **guess** the answer.

Construct Test Items

While there is a wealth of information available on test construction, Gronlund and Linn (1990) suggest these ten general suggestions:

1. Use your test specifications as a guide to item writing.
2. Write more test items than needed.
3. Write the test items well in advance of the testing date.
4. Write each test item so that it calls forth the performance described in the intended learning outcome.
5. Write each test item so that the task to be performed is clearly defined.
6. Write each test item at an appropriate reading level.
7. Write each test item so that it does not provide help in answering other items in the test.
8. Write each test item so that the answer is one that would be agreed upon by experts.
9. Write each test item so that it is at the proper level of difficulty.
10. Whenever a test item is revised, recheck its relevance (pp. 136-137).

Typically, teacher-made tests are referred to as either objective or essay tests. The objective tests include true-false, matching, multiple choice, short answer, completion, and performance items.

True-false. True-false questions are used to identify statements of fact or to identify definitions of terms. While these may appear to be the easiest type of test item to construct, actually the opposite is closer to the truth. Too often, sentences containing obscure pieces of information are taken directly from the textbook and used as test items. Also remember the student has a 50-50 chance of guessing and getting the item right based only on chance.

In constructing true-false questions, you need to avoid broad, general statements. "Words such as *usually, generally, often,* and *sometimes* are most likely to appear in true statements, and absolute terms such as *always, never, all, none,* and *only* are more apt to appear in false statements" (Gronlund & Linn, 1990, p. 155). You should avoid including two concepts in the same statement as one concept may be true and the other false, reasonably confusing the student by presenting a no-win or no-right/no-wrong answer situation. The true-false statements should be of similar length and number. You should also avoid developing a response set, for example, two true answers followed by two false answers followed by two true answers followed by two false answers and so on.

Here are some examples.

Poor: T F The debit is always the usual balance for all accounts.

Better: T F The debit is the usual balance for assets and expenses.

Poor: T F The communication process is really only important to the sender as he or she is the originator of the message and, therefore, more important than the receiver.

Better: T F The communication process requires the active participation of both the sender and the receiver.

The second example in the first pair above is the better statement as it avoids the word "always." The second example in the next pair above is the better statement because it is shorter than the first and more likely would be comparable in length to the other true/false statements; also, only one concept is included.

Multiple choice. Multiple choice items are comprised of two parts: a problem and possible solutions. The problem is called the *stem* and the possible solutions are called *alternatives*. Obviously, the correct alternative is the *answer*; the other alternatives are called *distractors*. Their name is derived from their job: to distract the test taker from the correct answer. A key quality for **all**

distractors is that they are **plausible**. Plausible distractors discourage guessing which defeats the purpose of a test being able to discriminate. Multiple choice items may be developed in the form of a direct question or as an incomplete statement.

Direct question:
What is the classification of the account *Office Supplies*?
A. Asset
B. Liability
C. Income
D. Expense

Incomplete statement:
The account *Office Supplies* is a/an
A. asset.
B. liability.
C. income.
D. expense.

From these two examples, you are also able to see two more important qualities of a multiple choice items. First, to the greatest extent possible, the alternatives should be in alphabetical order, in chronological order, or in logical order as are the alternatives in the previous two examples. Second, avoid giving a clue to the right answer as in the second example above. If the last word in the stem was "an" instead of "a/an," it would automatically eliminate 50% of the responses.

Multiple choice questions may be used effectively to measure knowledge of terminology, procedures, or facts as well as to interpret cause-and-effect relationships. You should also remember that the stem should contain as much information as possible and, thus, should be meaningful by itself, rather than just one or two words.

Matching. The matching exercise consists of two columns: the *premises* and the *responses*. The premises are those words or statements for which a match is sought. The responses are in the column from which the match is made. The matching exercise may be a *perfect match* where the number of premises and responses is the same. Or, the matching exercise may be an *imperfect match* where there are more responses than there are premises.

Several key points are important in developing strong matching exercises. The items in the premises must be homogeneous. The responses must be plausible.

These two points minimize the effect of guessing. Gronlund and Linn (1990) suggest a good use of matching exercises is to "identify the relationship between two things" (p. 159). Some examples Gronlund and Linn provide of relationships are:

Symbols - Concepts

Machines - Uses

Parts - Functions

Here is an example of a matching exercise for a beginning Accounting class:

1. Asset
2. Liability
3. Income
4. Expense
5. Capital

a. Money earned from the sale of a good or service.
b. Money used by the business to purchase goods and/or services.
c. Something of value that you or a business owns.
d. Owner's equity.
e. Money you owe for something you purchased.

Note that the premises, rather than being listed in alphabetical order, are listed in a logical order based on accounting principles and practice.

While matching exercises are an effective way to measure factual information, that is also its most significant limitation. In developing matching exercises, the responses are typically shorter than the premises; and the responses should be arranged in a logical order. Logical order might be chronological sequence or alphabetical order. All items from both columns should also be on the same page.

Short answer/completion. Short answer and completion test questions are exactly that: just a short answer, a word, number or symbol, is required to answer a question or complete a statement. These questions may be used to measure learning from simple to complex. While they are relatively easy to develop, the real value in their use is that students must **supply** the answer–guessing, through the process of elimination—is eliminated. The biggest limitation is the tendency to want to take sentences directly from the textbook and omit a word.

Direct questions are also better test questions than are incomplete statements. The blanks provided for either short answer or completion items should also be the same length. A poor and a better example follow:

Poor: A debit is _____.

Better: The normal balance of an asset is a _____.

In this example, the second example is better because there are several plausible answers for the first statement.

Performance tests. Performance tests are particularly useful in business education. They provide an opportunity for students to produce a product which they've been learning about and refining in class. Typically, these tests reflect industry standards and may, if developed appropriately, be referred to as authentic assessment as the work required mirrors that required in the workforce. Clearly, students know well in advance of test day what the standards are for performance–what is acceptable and what is not. These same standards are those against which student work will be evaluated. Typically a rating sheet or evaluation form may be developed to use in assessing the performance. The authentic assessment term for such an evaluation form is *rubric*. "A rubric provides *descriptors* for each level of performance, to enable more reliable and unbiased scoring. Sometimes *indicators* are used in or under a descriptor to provide examples or concrete tell-tale signs of each level" (Wiggins, 1998, p. 154).

An example of a performance test in a keyboarding class follows:

Key the marked-up manuscript, making corrections as noted with proofreader's marks. You should follow the guidelines in your textbook for left-bound manuscripts.

Here is a sample rubric that may be used for this performance test.

Rubric for Left-Bound Manuscript

Component	Excellent	Satisfactory	Poor
Title page	Title is centered; identifying information is centered and in proper place; no typos or grammar errors. (5 points)	All information is in correct place; one typo or grammar error. (3 points)	Information missing or not properly placed; more than two typos or grammar errors. (1 point)
Body of report	Neatly prepared; no typo or grammar errors; headings inserted correctly; all proofreader's marks adhered to; pages numbered. (5 points)	Neatly prepared; 1-3 typos or grammar errors; (3 points)	More than 3 typos or grammar errors; sloppy work; no page numbers. (1 point)
Reference list	Neatly prepared; adhered to APA style; alphabetized by authors' last names. (5 points)	Neatly prepared; entries alphabetized by authors' last names. (3 points)	More than 3 typos or grammar errors; did not follow APA style; entries not in alphabetical order. (1 point)

Simulations are still used in Business Education classes today. A *findings* test is an effective way to assess what the student has learned in this capstone experience. A findings test asks the student to find a variety of data generated in the simulation. For example, in an accounting simulation, students may be asked these questions:

1. What is the balance in the Cash account on January 20?
2. How much money was spent on office supplies during the first quarter?
3. What is the balance in the checking account on March 31?

4. What is the total for all expenses for the month of February?

5. What is the revenue or loss for the first quarter 2001?

Only that student who has done all the work accurately and kept current with the work will be able to answer the questions. Of course, the end-of-quarter and year-end balance sheets and income statements would be assessed for correct format as well as correct accounting practice.

Essay questions. Quite simply, the essay test is the best way to measure complex learning and achievement. It provides students an opportunity to think critically, organize thoughts, develop a logical discussion, and write coherently and correctly. Difficulty can arise in scoring if one doesn't plan for the answers when the test items are developed.

There are two basic types of essay questions: restricted response and extended response. With restricted response questions, specific limitations are stated in the question which limit the range of student response. These questions also help students narrow the focus of their answer. "The extended response question allows pupils to select any factual information that they think is pertinent, to organize the answer in accordance with their best judgment, and to integrate and evaluate ideas as they deem appropriate" (Gronlund & Linn, 1990, p. 213). In other words, the students have broad latitude in choosing how they will answer the question.

Because of the difficulty in scoring, the use of these questions should be restricted to assess achievement not easily determined by objective test items. The question should not be a word problem, using vocabulary and terms new to the student. Also, if possible, suggest an amount of time a student may want to spend on each question. Gronlund and Linn (1990) suggest these steps to increase ease and reliability of scoring essay questions:

1. Develop an outline of the expected answer when the test item is written.

2. Use the most appropriate scoring method. One is called the *point method* and the other the *rating method*. The point method allocates a certain number of points to each question; points earned are based on appropriateness of answer. The rating method uses a qualitative assessment where each paper is compared with the others for its relative merit and worth.

3. Know in advance how you will handle irrelevant information included in the answer.

4. Read and score all the same questions before going on to the next one.

5. Don't look at the student's name as you are grading the paper.

6. If this essay test is the basis for a very important decision, get more than two independent ratings.

You will also find that most teacher's manuals that accompany the textbooks you will use will have a test bank. A test bank provides a variety of types of questions and problems you may use in assessing student learning; however, it is rarely sound assessment practice to use every question provided for a chapter or unit. There are several cautions when using items from a test bank. First, the questions may not have been written by the author of the textbook; thus, the language and word choice for the test items may be different from that in the textbook. Because of your students and your experience, you may have chosen to emphasize different topics. You will then have to carefully scrutinize the items available and choose appropriately. You may also have included information in addition to that found in the textbook and will be required to develop items to assess if that content was learned. Clearly, test banks can serve a very useful purpose in the assessment process. However, just as an effective teacher evaluates other resources, test bank items must also be evaluated for appropriateness.

Assemble Test

You may want to consider developing your test questions in such a way so that data can be recorded for each question. For example, you may want to know the first time you used the question. You may want to record item-analysis information such as how many people miss the question at each administration. You may want to know which objective the item measures. A spreadsheet program would facilitate maintaining these kind of data.

Just as there is no rule that says a test must have 100 items or equal 100 points, nor are there rules that say true-false test questions must come first. The one practice you want to follow is to group all like test items together; otherwise, it may simply prove too confusing to the student, resulting in a poor performance. You also need to think about where you want the students to record their answers. Do you want the answers written in answer blanks on the test or do you want the answers written on an answer sheet or an electronic scoring sheet? If you decide to use an answer sheet, be very careful the numbers for different types of test items correspond. Also, be sure enough time is available for your students to complete the test. And don't take up important test time with unnecessary chatter. Make sure students understand directions and any time restrictions, and let them begin the test.

Grade Test

While it is a relatively easy process to mark answers right or wrong, using the data such scoring provides is more difficult. Item analysis provides a basis for a number of important efforts. Gronlund and Linn (1990) suggest the following uses of item analysis:

1. Item-analysis data provide a basis for efficient class discussion of the test results.

2. Item-analysis data provide a basis for remedial work.

3. Item-analysis data provide a basis for the general improvement of classroom instruction.

4. Item-analysis procedures provide a basis for increased skill in test construction. (p. 246).

While other information may be gleaned from item analysis, the aforementioned list provides the primary reasons for its use. A good measurement and evaluation textbook would let you know other ways in which items analysis may be used with norm-referenced classroom tests. The important idea to keep foremost in mind in the entire assessment process is that the goal is to improve student learning. Every aspect of assessment should move toward that goal.

Summary

As the beginning of this chapter stated, "*Evaluation* . . . is, the process of making a decision about student learning" (Freiberg & Driscoll, 2000, p. 398). Knowing what our students have learned is important for their continued academic achievement and, where needed, remediation. Student assessment is also a useful tool in knowing if we are successful as classroom teachers. This chapter has provided an overview of the most commonly used assessment strategies in Business Education.

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Chapter Six

Specialized Strategies for Business Subjects

This last chapter provides specific teaching strategies for a number of courses commonly included in business education programs in grades six through twelve. The information included here provides you with key information important in teaching these classes. Please know, however, this information is a foundation–each of these topics could easily be developed into separate monographs.

Keyboarding

Keyboarding may well be regarded as a basic skill for the 21st century. Few argue its value; rather, the discussion today centers around the grade level at which it should be taught. With computers being used in more and more homes every day, children easily develop incorrect keystroking techniques, often the "hunt and peck" method. Helping students "unlearn" incorrect keystroking habits is difficult and time consuming. Thus, the dilemma is where to begin to teach keyboarding in order to maximize the student learning. Increasingly, the move is to teach keyboarding in upper elementary school, around grades five, six, or seven. By this time, students have both the English language skills and eye-hand coordination needed to read text and manipulate a keyboard.

Once the decision is made as to the grade level at which keyboarding is taught, other decisions are made regarding how it will be taught. A number of keyboarding computer applications software packages are available. This software not only provides a platform for the actual lessons but also provides teachers' aides such as grade books and other classroom management tools.

West (1983) wrote the definitive book on acquiring keyboarding–then typewriting–skills. His research-based and classroom-tested methods are still useful today. He stated in light of the fact that the short-term goal is to cover the alphabet keys as quickly as possible in order to type "dictionary" words and "connected prose, however simple" (p. 91), there are several ways to teach the keyboard. "Teaching the keyboard has been done by horizontal rows (home row first), by diagonal rows (strong fingers first), and by the so-called skip-around approach. Most typewriting textbooks confine the first lesson to the eight guide keys on the home row. Some include *e* in a first lesson because it permits the use of more words than are possible with *asdfjkl*" (p. 91). The remainder of the alphabet keys are typically covered in about 15 lessons, teaching two to three keys per day. This sequence also allows for a day or two of reinforcement blended throughout the lessons.

West's (1983) reminder is prudent, "The keyboard is not learned during the keyboard lessons, but merely presented. The real learning takes place thereafter, as practice is applied to a broad vocabulary of materials that incorporate the various reaches to keys" (p. 92). He reminded the reader that learning the keyboard is an associative process, using stimuli and response in the process. He stated, "For associative learning, the mandatory requirements are for **contiguity** and **knowledge of results**" (p. 105). Meeting these requirements requires initial focus on speed rather than accuracy, "tolerance of early sight typing and assisting the transition to touch typing . . . [and] external pacing of the response rate" (p. 105). The focus on speed is to make the student key at a rate that is slightly uncomfortable, with 1-minute timed writings incorporated throughout every keyboard lesson after learning the home row keys. At this point the **actual speed** is not important, rather what is important is that the student typed more than in the last timing. So, asking "How many typed more this time than before?" rather than "How fast did you type?" and giving appropriate praise is critical in the developmental process. Early sight keystroking may provide reinforcement some students need in early learning. Clearly, though, this reliance must diminish as the student becomes more proficient and progresses to touch typing.

As the goal of learning to keyboard correctly is the production of usable materials, at some point the goal of accuracy must be addressed and incorporated. Human nature–for many of us–is to correct errors immediately, thus the backspace-and-type-over approach. West (1983) suggested this is okay if the error is recognized immediately and that it occurs during **untimed** practice. The other concern West raised regarding immediate error detection and correction is that it "is not an invitation to check the typescript stroke by stroke or word by word during the typing" (p. 108). This decreases speed and results in increasing dependence on sight typing. Keyboarding software may or may not permit students to backspace and strike over.

While much software available today requires little effort from the teacher, the teacher's role in beginning keyboarding is invaluable. Keyboarding software allows students to work relatively independently. Students are easily able to see correctly keyed words and phrases as well as those with errors and get immediate, electronic feedback regarding the accuracy and/or speed of their work. But only the **teacher** can provide the external feedback, the all-important encouragement, required in skill acquisition and building. The teacher demonstrates correct techniques and works to correct bad habits. The teacher monitors student work and knows when to slow or stop the class to provide additional, specific instruction.

Numbers and symbols are typically taught after all the alphabet keys. While touch typing these keys is the goal, excessive time and practice generally do not realize a sufficient return. Proficiency with number and symbol keys most frequently comes through daily use in the workplace. The decision must also be made as to whether you will teach the numbers from the top row of the keyboard or from the keypad. The advantage of learning the numbers on the top row of the keyboard is that the student's entire hand never has to leave the home row keys, only that finger making the stretch to the number row. While learning to use the keypad by touch is clearly a useful skill, it is most useful when working with numbers **alone** like in an accounting situation.

In the early stages of keyboarding, student evaluation is most often based on keystroking technique and posture. As the skill is acquired, evaluation moves to include timed writings, where both speed and accuracy are important. Ultimately, however, assessment measures will become almost exclusively performance or production tests where the students produce the documents learned throughout the course. The speed with which one moves through the course may be determined by the grade level at which it is offered as well as whether it is a one-semester or a one-year course.

Rates for speed and accuracy in timed writings and production tests will be included in the course materials you choose. You may also consider surveying local industry standards to see how closely the ones you use match what your students will need to be able to do in the workplace.

Clearly, this discussion is but a simple introduction to keyboarding. A wide variety of materials are available from publishing houses, the National Business Education Association, and professional publications such as the *Business Education Forum* and *The Delta Pi Epsilon Journal*.

Computer Applications Software

Increasingly computer applications software is delivered via "suites" such as the Microsoft Office 2000 Professional suite or the Corel Office suite. These packages typically include word processing, spreadsheet, database management, and presentation software. The suite format allows for greater ease in both moving through and "transporting" documents from one application to another.

In any or all of these applications, the focal point of instruction should be understanding the concepts the software uses rather than all the minutia possible with the software. For example, with word processing software, obviously the student must learn how to use the particular software for document development and refinement. However, the student also needs to see the bigger picture in that **all** word processing software is designed around the same concept of document development and manipulation; they are just designed differently. In other words, once one has become relatively proficient at say, MSWord, one should be able to transition without great difficulty to using WordPerfect. The most effective way to show students the transferability of such a skill is have them learn some degree of proficiency with one word processing software and then, with only an introduction, switch to a different software and work through similar assignments.

Schmidt and Kirby (1995) reported on software curriculum developed by the Virginia Department of Education. The curriculum identified these nine functions and tasks of software:

- Vocabulary includes the identification of terms, concepts, and commands useful to computer operation and task performance.

- Access software tasks allow the student to get the software up and running.

- Data/text entry tasks are keyboarding operations and include entry of letters and numbers, and operation of special function keys.

- Editing tasks allow the student to add, delete, change, or reorganize data entered in the computer by key or mouse operation.

- Formatting tasks enable the student to arrange text or graphic elements on the page or in a document.

- Printing tasks are those related to printer access and operation.

- File management tasks help the student store and access information at the computer.

- Production includes assignments that apply a combination of tasks to realistic job activities.

- Troubleshooting tasks require the student to solve problems commonly encountered by computer users. (pp. 35-36).

The relevance of these functions is "to help teachers get away from focusing on the teaching of specific software packages and, instead, to have students learn skills that will not become obsolete quickly" (Schmidt & Kirby, 1995, p. 36). These functions also provide an excellent framework for better contextualing classroom work, making the transition to the workplace easier and more successful.

Clearly, the best way to determine whether or not students know how to use these software applications is to have them actually use the software to produce documents. Production or performance tests based on workplace standards and examples provide the best evidence of their ability to manipulate the software.

Accounting

Students enroll in accounting courses for occupational preparation, general education, and college preparatory education. Regardless of the reason, accounting courses also provide opportunities for all students to engage in career exploration, to learn the language of business, and to benefit personally. Gilbertson (1992) suggested three steps in planning for teaching accounting: determine learning outcomes, develop appropriate learning activities, and develop appropriate evaluation techniques.

Perhaps one of the most important first steps taken when class begins, however, is that of generating enthusiasm for the course. Unfortunately, accounting is often seen as a necessary evil–important but not very exciting. The atmosphere the teacher develops from the very first day sets the stage for the remainder of the term. Connecting what students are learning with uses in their everyday lives is one means of generating interest. To get students thinking about how accounting can make their lives easier–now and later–have them think about what certain folks' lives would be like if accounting systems did not exist–people like Brittney Spears or Leonardo DiCaprio or Michael Jordan or the President of the United States or Bill Gates. How would these wealthy people know how much money they had and how it was spent without an accounting system?

Typically, accounting textbooks begin with an exploration of careers, then move to understanding the effect of transactions on the owner's investment or equity and cash, and then to an introduction of the double-entry system of accounting and analyzing transactions. Early introduction to the accounting equation is important because "it forces the learner to analyze first *why* each transaction affects the accounting equation, and second *how* it affects the equation" (Schrag & Poland, 1987, p. 307). The use of T-accounts is extremely beneficial here as they provide a **visual** representation of (1) whether an account balance is increased or decreased and (2) the actual double entry, a plus for one or more accounts and a minus for one or more accounts. The need for actually seeing the effect of transactions is critically important, especially for the visual learner. Thus, having students use pencil and paper when they begin analyzing and journalzing transactions is important not only because it allows the teacher to determine if the students understand the concept but it also, and perhaps more importantly, allows and really requires that the students **see** the effects of the transaction.

The following are the topics and the sequence included in beginning accounting courses today:

- Effect of transactions on owner's equity
- The double-entry accounting system; analyzing transactions
- Recording transactions in a general journal
- Posting from a general journal to a general ledger
- Preparing a work sheet
- Developing financial statements for a proprietorship
- Recording adjusting and closing entries

Once students have a firm grasp of this foundation, they move to learning about payroll accounting, payroll liabilities and tax reports and payments, special procedures to include depreciation, uncollectible accounts receivable, inventory, notes payable and receivable, and accruals.

While software accompanies the major accounting textbooks today, the students first learn and use a manual approach. As the course progresses, paper-and-pencil and automated lessons can merge. Accounting software can allow the student to customize financial reports, just as one would in the workplace. Because using the software to develop financial statements is also faster than pencil-and-paper statement development, the focus can move more quickly to analysis of the statements.

The use of visuals, whether they be transparencies, T-accounts, or software, is an important part of accounting instruction as it helps the students visualize, and thus strengthen, the relationship between theory and practice. The ability to see this relationship becomes increasingly important as students move through the accounting course, especially when the time comes for adjusting and closing entries, a difficult concept for many students.

A number of evaluation measures are used in accounting courses. These include objective tests at the beginning of the course to measure knowledge acquisition. Accounting word problems, simulation audits, and findings tests may be used once the student is knowledgeable about the accounting cycle.These assessment/ evaluation measures provide a closer approximation to real world accounting problems than do objective tests. They also require the student to **do** accounting, which is the only way one is able to determine what the student **knows** about accounting.

Especially in accounting, homework is an important extension of classroom learning. Perhaps the term "home learning" is more palatable. Nonetheless, work done outside of class provides valuable reinforcement of skills learned in class. In order for students to take the homework seriously, though, some part of the final grade must be assigned to the work. Getting students started on their homework **in** class is an excellent way of finding out if they really do understand the concept being reinforced. Answering just one question in class as homework is started may mean the difference in whether or not the student will complete the homework assignment. Reviewing completed homework in class is an excellent way of involving students. Students may be called upon to participate in analyzing transactions, journalizing entries, and/or describing adjusting and closing entries. Of course, informal evaluations such as simply asking questions after a concept has been presented is a simple and speedy way of knowing if students have grasped the concept. Returning homework in a timely manner with feedback is an important way to reinforce student learning.

West's (1983) admonition regarding learning keyboarding is equally appropriate in learning accounting: the real learning does not take place during presentation but rather later in the application of the topic. Learning accounting does not come through abstract reasoning but rather through basic application and use. Much is required of the accounting instructor as timely and frequent feedback is key because of the sequential nature of the course. Returning homework or an exam two weeks after completing either assignment diminishes any value either might have had.

Basic Business

In the first statement developed by the Policies Commission for Business and Economic Education, the authors wrote, "Business education in American secondary schools consists of both general education and vocational preparation for store and office occupations. These two elements of business education are essential parts of secondary education in America" (Policies Commission, 1961). In 1970, the Policies Commission reiterated this mission by recognizing the impact of business education on the economic literacy of all secondary students. The 1970 statement continued,

> **Roles as Consumers, Workers, and Citizens**
> The consumers, workers, and citizens should know how to interpret economic issues which affect them and how to manage their economic affairs efficiently.
> *We Believe That*
> Opportunities must be provided for secondary school students to develop an understanding of how our business system operates . . .
> Programs that develop economic understanding should be planned cooperatively with other departments of the school that are concerned with economic education . . .
> Any requirements relating to the development of personal and social economic competencies should be reciprocally recognized by the respective departments of the school . . .

This statement is as relevant today as when it was written in 1970, perhaps even more so because of the unprecedented wealth of today's youth. Unfortunately, many see courses under the basic business umbrella as uninteresting and not valuable. Actually, the opposite can easily be the case, especially with the incorporation of Internet activities.

Introduction to Business

The overall purpose of this course is to provide a basic understanding of business and the economy. Daughtrey and Ristau (1991) suggest these five purposes of the course:

1. To aid the student in developing a fundamental understanding of the American economic system, especially as it applies to the business sector

2. To aid the student in developing abilities which skillful consumers apply in buying and using goods and services available in the marketplace

3. To inculcate student awareness of the importance of analyzing business-economic problems and making reasoned judgments in solving them.

4. To aid the student in developing an understanding of the relationship between personal decisions, both as a consumer and as a voter, and the total economy

5. To introduce to students the wide variety of career opportunities in business (p. 146).

Typically, this course is taught at the ninth grade level. By this time many students may hold part-time jobs such as babysitting or lawn care and have some money of their own in addition to any allowance a parent or guardian may provide. Because of these situations, the relevance of the course to student needs is more easily seen. Daughtrey and Ristau (1991) suggest these performance objectives:

1. Give an example showing that economic resources are limited
2. Identify five features of our market economy.
3. Identify three economic roles each person plays.
4. Explain how the GNP is used as a measure of economic growth.
5. Explain what a career is and why career planning is important for students.
6. Give examples of how small businesses are important in the U.S. economy.
7. List at least seven characteristics of successful small-business owners.
8. List eight services provided by banks.
9. Compare revolving charge accounts with other forms of credit.

10. Tell how insurance provides protection against economic loss.

11. Tell why monopolies are not considered to be in the best public interest (p. 147).

While a number of textbooks are available, a creative teacher would be able to develop a course around these 11 objectives simply by using life experiences, community resources and business people, and information free and readily through agencies such as the Joint Council on Economic Education. The daily newspaper alone, combined with careful use of the Internet, are two of the richest resources available for use in this course.

Daughtrey and Ristau (1991) suggest using a four-phase historical approach which includes the following: "(1) the economic setting of business, (2) the services of business, (3) the relationships of business to government, labor, and international trade, and (4) the individual in our economy" (p. 150). The real beauty of this approach and this course is that a wide variety of strategies can and should be incorporated. You may include discussions, role playing, simulation and/or games, and projects. Nearly all these activities can be specialized by topic and student needs and/or abilities.

You may use objective tests to evaluate basic student learning. However, more meaningful assessment strategies such as comparison shopping assignments and cases should also be used. Students may also be required to develop a budget based on their own "income" and "expenses" and prepare regular financial statements reporting their financial situation.

Consumer Economics

America is a nation of consumers. Shopping, rather than baseball, appears to have become the national pastime for many; and their credit card balances reflect that passion. We must, of course, be consumers of those goods and services required to live: food, shelter, clothing. Beyond satisfying or meeting these basic needs, one's socioeconomic level–real or desired–may then provide the basis for acquiring the things we **want** beyond what we **need**.
Consumer economics is usually taught in grades 9 or 10. By this time, students may have part-time jobs and allowances which permit them to become consumers. Thus, the time is exactly right for establishing relevance of the course to the lives they are leading.

Daughtrey and Ristau (1991) suggest these objectives for consumer economics which typically emanate from personal economic problems:

1. To aid students in improving their understanding of the American economic system, with particular emphasis on the consumer sector.

2. To aid students in improving their ability to evaluate, buy, and use the goods and services available to consumers, and to manage their personal financial affairs knowledgeably.

3. To aid students in developing an understanding of the real cost, or opportunity cost, of consumer decisions, and the ability to use this principle in analyzing vital problems.

4. To aid students in developing an understanding of the role of consumer decisions play in the allocation of resources in our market economy, and of consumers' responsibilities in making the economy operate efficiently.

5. To aid students in understanding the role of government in promoting consumer welfare.

6. To aid students in acquiring knowledge about reliable sources of consumer information.

7. To aid students in increasing their understanding of the role advertising plays in the marketplace and improving their ability to interpret advertising discriminately.

8. To aid students in developing and improving the skills necessary for performing their consumer roles intelligently: reading, interpreting, and understanding consumer reports, indexes, advertising, financial statements, and computational skills necessary to handle their financial affairs (pp. 186-187).

These objectives center around four major categories established by the Joint Council on Economic Education: "(1) decision making and the consumer, (2) functioning of a market, (3) effects of government actions on consumers, and (4) the interrelationships among government, business, and consumer decisions" (Daughtrey & Ristau, 1991, p. 189).

While textbooks are available, a myriad of other resources are available and ought to be included for the timeliness and relevance they will bring to the class. Students, too, will be rich resources by sharing their experiences as consumers and what they have learned from those experiences. A variety of strategies are useful in consumer economics: debate, role playing, case problems, and simulations. Each of these provides a different way of teaching concepts important for all students.

Here, too, objective tests are an efficient way of assessing basic student knowledge of consumer economics. However, more authentic assessment strategies would include a series of increasingly difficult and varied comparison shopping assignments. You might start with shopping for CDs or clothes or sporting goods and then move to more expensive items such as electronics and then proceed to cars and car insurance. Not only are all these items and processes relevant to students, they also provide a foundation from which students can one day move to buying homes, investments, etc.

Business Law

Business law can be the one class where both teachers and students struggle to find the relevance for the high school classroom. The wise teacher will look to consumer applications of the law as foci for the course–something everyone needs to know about as soon as they become consumers. Another reason for studying business law is its evolving nature. Every year local, state, and federal governments pass new laws affecting their citizens. Consumers need to know about those laws affecting them and their rights.

Daughtrey and Ristau (1991) suggest these five objectives:

1. To understand the procedures used to develop and enforce laws.
2. To recognize the major categories of law and their applications
3. To learn and apply basic principles of consumer, commercial, and criminal law.
4. To use a case approach in problem solving.
5. To develop a respect for the legal system and the rights and responsibilities of citizens (p. 210).

Business law is typically offered in grade 11 or 12 and usually offered for only one semester. Candidly, business law can be one of the most challenging courses for a secondary business education teacher. Difficulties center around "the teacher's level of confidence, the technical nature of law, and the students' learning styles" (Daughtrey & Ristau, 1991, p. 212). Community resource people from the legal profession and law enforcement community can be valuable contributors to a business law course. This course also lends itself extremely well to field trips to places like the local courthouse to see a trial in session or visit with a judge or to a local jail–that visit typically makes a lasting impression!

Discussions, case problems, and mock trials are frequently used strategies for introducing and reinforcing concepts taught in a business law class. Here, too, the daily newspaper will often be a rich source of daily topics relevant to a business law class such as court cases, U.S. Supreme Court decisions, and public violence to name a few.

Evaluation strategies for business law would include objective tests at a minimum. Business law is also a good class to use case studies as an evaluation method.

Marketing

Typically, in a business education program, marketing would be incorporated into a variety of courses, especially those included under the basic business umbrella. As a subject, marketing is defined as those activities directing the stream of goods and services from the producer to the consumer. This course provides basic knowledge *about* the business of marketing for students.

Topics included cover a wide range from principles of retailing to advertising to buying to displays to fashion merchandising to home furnishings and interior design. Typically, marketing is a separate department from business education whose teachers pursue separate certification. Courses typically included in a marketing education department are reflective of the list of topics mentioned earlier in this paragraph. Internships are often an important part of the marketing education curriculum where students are able to work in some aspect of the industry to further develop and refine skills learned in class.

The school store is often managed and run by marketing education students. This provides a start-to-finish experience where they must develop a business plan to include the target market, the product/s sold, a marketing plan, staffing the store, and accounting for the financial aspect of the business. This also provides an excellent opportunity to partner with business education students who bring different kinds of expertise to this excellent form of contextualized learning.

Objective tests provide an easy avenue for assessment in marketing courses. However, performance as a school store employee might also be included as a sort of performance test.

Information Technology

Business education, perhaps more than any other program area, has been affected by information technology. Inherent in the use of information technology is the tension between teaching the technology and using the technology as a teaching tool. Unfortunately, teaching the technology is often seen as an end in itself rather than a tool for many uses. Kizzier (1995) provides direction as to how these two are different. "Business teachers have served as both pioneers and leaders in 'teaching the technology.' In this role, teachers prepare students with the competencies to productively use current business hardware and software" (p. 10). "Technology as a teaching tool is used in one of two ways: (1) Students use the technology as a vehicle to learn skills and concepts beyond the technology itself, or (2) the teacher uses technology to enhance or support teaching" (p. 11).

Kizzier (1995) suggests with teaching the technology that students, in fact, may most likely direct their own learning through online documentation and simple trial-and-error in using the Internet. Once this fundamental knowledge is acquired, students are then equipped to understand and use the technology as a learning vehicle. Teaching the technology will be an increasingly less time-consuming task as students come to the classroom already equipped with that skill. The reality may well be one where learning by demand takes place; where, once a determination of student needs is made, specific learning to meet the student's need is developed.

The following is a partial list of technologies Kizzier (1995) developed and examples of how they may be used both in teaching the technology and as instructional tools.

CD-ROM

In teaching the technology, "Students are taught how to access CD-ROM library databases to conduct research and to record data and audio on CDs for student presentations. As an instructional tool, "Teachers use CD-ROMs to design audiovisual class presentations" (Kizzier, 1995, p. 14).

Electronic Mail

In teaching the technology, students learn–if they don't know already–how to use electronic mail as a communication channel. As an instructional tool, "Teachers use an electronic mail system to conveniently communicate in a timely and inexpensive manner with students, colleagues, and content experts and to review students' work and to provide feedback" (Kizzier, 1995, p. 15).

Multimedia

In teaching the technology, "students can be trained in the use of multimedia to prepare projects and presentations" (Kizzier, 1995, p. 19). As a teaching tool, "students can access information on multimedia encyclopedias or take courses independently by using multimedia courseware" (Kizzier, p. 19).

Videoconferencing

In teaching the technology, "pre-service and in-service teachers can be taught how to use the technology to control multiple classrooms at various sites" (Kizzier, 1995, p. 21). As a teaching tool, "K-12 teachers can access distance learning networks that colleges and universities are building" (Kizzier, p. 21).

In addition to the resources, clearly the Internet is an amazing instrument for classroom use. Effective instruction using the Internet, however, must be well planned, organized, and closely monitored. Web sites included in classroom instruction must be viewed and evaluated prior to classroom use. Teachers also may choose to develop a "contract" for Internet use which is signed by the student and his or her parents.

Evaluation of student learning in information is typically performance- or production-based. Students may be asked to develop a CD or a website or a listserv to be used with e-mail. These are obviously authentic assessment strategies which clearly establish what students know and are able to do with regard to information technology. These evaluation strategies are also reflective of skills needed in the workplace.

This is ample evidence of the fact that business education teachers' need for continuing education and professional development is critical to the success, both in the classroom and the workplace, of their students. The use of technology also speaks to value and continuing need to meet the learning preferences of students.

Summary

Chapter Six represents a broad discussion of the topics frequently taught under the Business Education umbrella. Business education courses offered by individual school districts may vary widely. However, this chapter provides a foundation for commonly taught courses and basic course content.

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ISBN 1-881530-22-1

CE085037 0

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Author(s): Wanda Stitt-Gohdes

Corporate Source: Delta Pi Epsilon
PO Box 4340
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Publication Date: 2002

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